IBM SPSS Data Collection Interviewer Server Administration 6.0.1 User's Guide

Note: Before using this information and the product it supports, read the general information under Notices on p. 161.

This edition applies to IBM SPSS Data Collection Interviewer Server Administration 6.0.1 and to all subsequent releases and modifications until otherwise indicated in new editions.

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Preface

Welcome to the *IBM® SPSS® Data Collection Interviewer Server Administration 6.0.1 User's Guide*. This guide provides information on using IBM® SPSS® Data Collection Interviewer Server Administration . For information about installing the application, see the *IBM SPSS Data Collection Server 6.0.1 Installation Guide*.

Adobe Portable Document Format (*.pdf*) versions of the guides are available on the *IBM SPSS Data Collection Server* DVD-ROM. Viewing and printing the documents requires Adobe Reader. If necessary, you can download it at no cost from *www.adobe.com*. Use the Adobe Reader online Help for answers to your questions regarding viewing and navigating the documents.

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IBM SPSS Data Collection Interviewer Server Administration User's Guide

Welcome to IBM SPSS Data Collection Interviewer Server Administration

IBM® SPSS® Data Collection Interviewer Server Administration is an easy-to-use tool for running a variety of IBM® SPSS® Data Collection Web activities on a project of your choice. It also provides the following management and maintenance facilities:

- EditProject for setting and changing project properties.
- User Administration for maintaining user and group accounts, and for determining which user groups have access to a project and who can use certain features within an activity
- Files for copying project files between your working folder and the shared project folder and between Interviewer Server Administration and your computer.
- Concurrent Usage report provides information on the number of users who have used the various Interviewer Server Administration activities during a particular time period.
- Manage Logs for viewing log files for Interviewer Server Administration and the activities that run inside it.

What's new in IBM SPSS Data Collection Interviewer Server Administration 6.0.1

This topic summarizes changes in IBM® SPSS® Data Collection Interviewer Server Administration 6.0.1.

Support for reserved names and keywords in metadata. IBM® SPSS® Data Collection now provides full support for SQL and mrScript reserved names and keywords in metadata variables. In previous releases, the use of reserved SQL keywords could cause issues when using the IBM® SPSS® Data Collection Data Model to query data for processes such as DMOM; the use of reserved mrScript keywords could cause syntax errors when referenced within a routing script.

Refer to the *Reserved Keywords* and *Keyword Summary* topics in the IBM® SPSS® Data Collection Developer Library for more information.

Concurrent Usage report

The new Concurrent Usage report provides information on the number of users who have used the various IBM® SPSS® Data Collection Interviewer Server Administration activities during a particular time period. For more information, see the topic Concurrent Usage report on p. 44.

User Administration

The following User Administration features and enhancements were implemented in version 6.0.1.

Export Data activity feature. The following activity feature is new:

- *Export Data > Can alter data link connection properties* This feature allows you to provide inputs for custom properties, allowing you to define the mr Init Custom portion of both the input and output connection strings.

Customer accounts enhancements. You are now provided more customization options when working with customer accounts. You can now specify the following attributes:

- Product name images
- Logo images
- Default page picture images
- Banner images
- Banner background tile images
- Tab images *.zip* files
- Rounded table images *.zip* file

For more information, see the topic Adding customer accounts on p. 62.

x64 64-bit support. x64 64-bit editions are now provided for the Data Collection applications (note that IBM® SPSS® Data Collection Author Server Edition and IBM® SPSS® Data Collection Survey Reporter Server Edition are only provided as x86 32-bit). Refer to the appropriate Data Collection installation guide for more information.

Fix pack and hotfix information. You can now view information regarding which fix packs and hotfixes are installed via the application's Help menu.
Help > About Data Collection... > Details...

What's New Information for Previous Releases

What's New information for previous Data Collection\Dimensions releases can be found in the Data Collection\Dimensions What's New document.

The document is in Adobe Portable Document Format (*.pdf*) Viewing and printing the document requires Adobe Reader. If necessary, you can download it at no cost from *www.adobe.com*. Use the Adobe Reader online Help for answers to your questions regarding viewing and navigating the document.

Starting IBM SPSS Data Collection Interviewer Server Administration

▶ In your browser type http://server_name/SPSSMR/DimensionNet/default.aspx

This displays the IBM® SPSS® Data Collection Interviewer Server Administration login page.

▶ Enter your user name and password.

- Optionally, select Remember my user name for future logins. With this selected, Interviewer Server Administration automatically displays your user name so you just have to enter your password.

- Click Login.

  The main Interviewer Server Administration page is displayed.

- Do one of the following.
  - To work on an existing project, select the project in the project list.
  - To create a new project, click the New Project icon in the toolbar above the project list.

  Note: If you want to simultaneously login to separate Interviewer Server Administration sessions as different users, select the Internet Explorer **File** → **New Session** option.

Recommended browser settings for IBM SPSS Data Collection Interviewer Server Administration

Recommended browser settings for running IBM® SPSS® Data Collection Interviewer Server Administration are as follows:

- Clear the browser's cache (you should do this each time a new version is installed)
- Load pages on each visit
- Do not display friendly HTTP error messages
- Cookies enabled

Configuring your browser

- Open your browser and select
  Tools > Internet Options

  This displays the Internet options dialog box.

- Make some or all of the following changes.

Setting	Action
Clearing the cache	On the General tab, click Delete Files and confirm your request when asked to do so (it is up to you whether you also choose to delete offline content).
Loading pages	On the General tab, click Settings. Then select Every visit to the page and click OK. This makes the browser reload a page each time you visit it rather than loading the previous version of that page from its cache.
Friendly HTTP error messages	On the Advanced tab, deselect Show friendly HTTP error messages in the list of Browsing options and click OK.
Enabling cookies	The Privacy tab reports your security setting and what, if any, cookies your browser allows. If your browser disallows all cookies, click Advanced and select the options to allow cookies.

IBM SPSS Data Collection Interviewer Server Administration in other languages

You can display the application in a language other than English. You can change the language at any time by following the appropriate instructions below. Close the application before making these changes. You can change the language back to English at any time or even switch back and forth between supported languages.

To change the display language

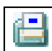
1. Open Internet Explorer and select:
   Tools > Internet Options
2. Click the Languages button and select the appropriate language from the Language Preference list. If the desired language does not display in the list, click Add... and select the language in the Add Language dialog.
3. Use the Move up and Move down buttons to control the language order preference. The language at the top of the list will be used as the default language.
4. Click OK to save your changes.

The IBM SPSS Data Collection Interviewer Server Administration screen

The IBM® SPSS® Data Collection Interviewer Server Administration screen is divided into two sections. On the left is the project list, showing the projects you may work on. On the right is the activity list for the project you have chosen.

The Project list

The project list displays all projects that exist in DPM and that you can access. An icon in front of each project name tell you about the project's status.

	Inactive. The project is not yet available for interviewing, or is a project that is for use in IBM® SPSS® Data Collection Survey Tabulation only.
	Test. The project can be used for running test interviews.
	Active. The project can be used for live interviewing.
	Inactive and locked.
	Test and locked.
	Active and locked.

If you hover over an icon or a project name, Interviewer Server Administration displays a pop-up showing the project's type (IBM® SPSS® Data Collection Interviewer Server or Survey Tabulation) and status. If the project is locked, the pop-up tells you who has locked it.

For further information about the project list see The Project List.

The Activity Information panel

Whenever an activity starts, the Activity Information Panel is displayed in the upper right portion of the screen. It lists the name, ID and description of the current project and provides brief help about what to do next. You can shrink the panel so that only the title bar is visible by clicking the button on the right of the title bar. Clicking the button again reopens the panel.

The Activity list

The activities that are available for a project depend on which products are available, what you are allowed to access, whether the project is locked by another user and, for Interviewer Server projects, the project's status and requirements:

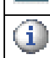
- You will not see Survey Tabulation in the list of activities if it has not been installed. Similarly, the Interviewer Server activities will not be shown if Interviewer Server has not been installed.
- Access to Interviewer Server Administration activities is controlled by roles and each role has access to a different set of projects and activities. Some users may have one role and others several roles. How the roles are set up will vary. For example, users who belong to the *ScriptWriterGroupA* role might have access to a different set of projects and activities from a user who belongs to the *AnalysisGroupB* role. The *ProjectManagerGroupA* role might have access to the same activities but a different set of projects from the *ProjectManagerGroupB*, and so on.
- When a project is locked by another user, some activities that you can normally access may not be available.
- For Interviewer Server projects, if the project has not been activated, you will see the activities related to setting up a project, including Build, Launch, Participants, and Files, but not those associated with viewing or exporting data. Similarly, if the project has been activated but does not use Sample Management or Quota Control, there may be a link for the Survey Results activity so that you can view data for the project, but Quotas or Participant Rules will not be displayed because they are not relevant to this project.

Some activities work with certain browsers only. Activities that do not work with the browser you are using are marked with the following icon:

Figure 1-1
Icon for activities that do not work in the current browser

Icons common to all IBM SPSS Data Collection Interviewer Server Administration activities

The following icons are available for all Interviewer Server Administration activities.

	Close the activity
	Open online help in a new browser window.
	Display project information: name and ID, status, description, connection string, who has locked the project, and notes. The information appears in a pop-up when you hover over the icon.

Changing your password

The administrator sets your password when he/she creates your IBM® SPSS® Data Collection Interviewer Server Administration user account, and can specify whether or not you may change it. Sometimes, you will be asked to change your password the first time that you log in.

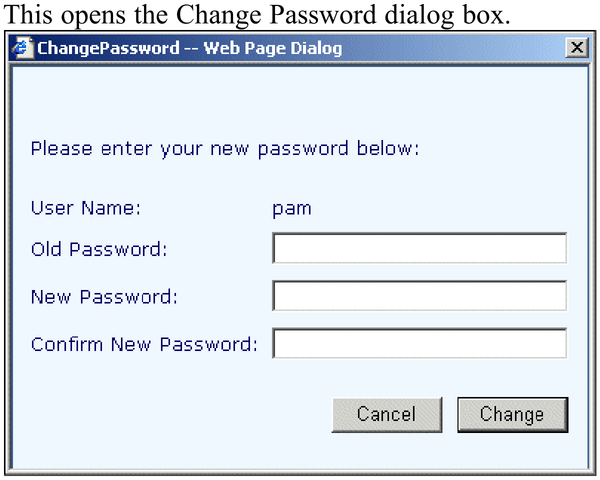
If you are allowed to change your password at other times you will see an option in the Tools menu for doing so.

Administrators may change any user's password, so if you have forgotten your password you can ask your administrator to assign you a new one.

▶ To change your password, choose

Options > Change Password

This opens the Change Password dialog box.



▶ Enter your current password and the new password. Confirm the new password.

▶ Click Change to make the change and close the dialog box.

Changing other peoples' passwords

If you run Change Password as an administrator, the dialog box that is displayed has a User Name text box in which you select the name of the user whose password you want to change. There is no prompt for the user's existing password as this may not be known. Just enter and confirm the new password.

Setting IBM SPSS Data Collection Interviewer Server Administration options

IBM® SPSS® Data Collection Interviewer Server Administration options control the following aspects of Interviewer Server Administration behavior:

Project list. You can control which types of projects you see in your project list and the order in which they are shown. Folders are always sorted in alphabetical order, but within folders projects can be sorted by name or status, and you can choose to exclude projects with certain statuses from the list.

Activities list. You can sort activities by name or type, and can suppress their descriptions.

Language. The text in the Interviewer Server Administration GUI is normally displayed in English, but translations in other languages are available. If your browser's language is set to a language that is available in Interviewer Server Administration, then your Interviewer Server Administration language will be set to match the browser language. For more information, see the topic IBM SPSS Data Collection Interviewer Server Administration in other languages on p. 4.

If you have your browser set to work in one language but want to run Interviewer Server Administration in a different language, you may set the language within Interviewer Server Administration. For example, if your browser runs in Japanese, then Interviewer Server Administration will automatically run in Japanese too. If your browser runs in English and you want to run Interviewer Server Administration in Japanese, set the language to Japanese in Interviewer Server Administration.

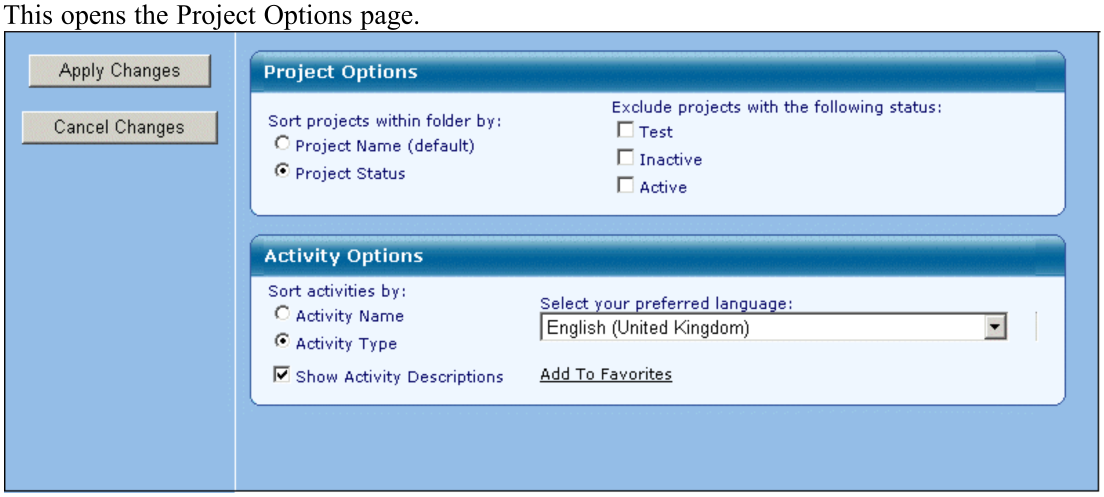
Browser favorite. You can add Interviewer Server Administration to your browser's Favorites.

Controlling how Interviewer Server Administration displays projects and activities:

▶ Choose:

Options > Preferences

This opens the Project Options page.



▶ Choose the Project and Activity options you want.

- In "Select your preferred language", choose the language in which you want the Interviewer Server Administration GUI texts such a menu names and error messages to be displayed.
- Uncheck Show Activity Descriptions if you do not want to see descriptions for each activity.
- If you want to add Interviewer Server Administration to your browser's Favorites list, do the following:
  - Click Add to Favorites. This opens the standard browser Add Favorite dialog box.
  - Choose where the link should appear in the favorites list and click OK.
- Click Apply Changes.

The project list

The project list displays all the projects that you can access using IBM® SPSS® Data Collection Interviewer Server Administration activities. These may be projects that you have created yourself or projects that others have created and that you have permission to use. If you create projects that only certain people may access (for example, people who work on the same client's projects) no one except those people will see those projects in their project list.

The project list may be a simple list of project names or it may be organized into a hierarchical structure in which similar or related projects are grouped within folders of by customer account. Folder creation and deletion is directly related to the creation and deletion of projects: you cannot create or delete empty folders. When you create a project, you can (if you have the appropriate permissions) create a new folder in which to place the project or you can place the project in an existing folder. When you delete projects in folders, Interviewer Server Administration automatically deletes the folder when you delete the last project from the folder.

The project list is sorted in alphabetical order, folders first, similar to Windows Explorer. If you sort the list by project status, projects are sorted by name within their status groups.

Note: The hierarchical project list is a display feature only. It does not create a hierarchical structure on the disk. All projects are created in the user's working folder (for example, in Users\ben\Projects) even if they are displayed as being in a folder in the project list.

The following permissions levels control how you can work with the project list:

- Users with no special permissions can create projects at the top level of the hierarchy or in an existing folder, but cannot rename projects, move them to different folders, or delete them.
- Users with "Can manage project folders" permission can create new folders when they create projects, can move projects into folders or from one folder to another, and can rename and delete project folders.

Your IBM® SPSS® Data Collection administrator will tell you what permissions you have.

Navigating in the project list

You can use standard Windows methods for navigating in the project list.

- Using the mouse, scroll through the list and click to select a folder or project.
- Using the keyboard, press ↑ and ↓ to move through the list and press the space bar to select a project or folder.

Expanding and collapsing project folders

Figure 1-2
Expand All Folders icon

Figure 1-3
Collapse All Folders icon

If the project list contains folders, the list is shown fully collapsed the first time you start IBM® SPSS® Data Collection Interviewer Server Administration so that only the names of folders and projects that are not part of folders are visible. You can see more projects by expanding some or all folders. When you close Interviewer Server Administration, it remembers your project list settings and displays it that way in your next session.

- To expand or collapse a single folder, click the small plus or minus icon next to the folder or double-click the folder icon. If you would rather use your keyboard, press → to expand a folder or ← to collapse it.
- To expand or collapse all folders, click the Expand All Folders or Collapse All Folders icon as appropriate.

Moving existing projects into folders

Figure 1-4
Cut icon

Figure 1-5
Paste icon

If you have the right permissions, you can move projects into folders or from one folder to another. The easiest way to move a project is to drag it from its current location to the new one. Alternatively, proceed as follows:

▶ Select the project.

▶ Click the Cut icon.

The project's name is dimmed.

▶ Select the new project location.

▶ Click the Paste icon.

Note: Drag-and-drop is not supported for Firefox browsers.

Renaming projects and folders

- To rename a project, select it and click the Edit Project Properties icon. For more information, see the topic Changing Project Details on p. 46.
- To rename a folder, double-click on the folder name and enter the new name in the box that appears around the folder name. Press Enter to save the change.

Note: If you rename a folder that contains some projects that you cannot access, IBM® SPSS® Data Collection Interviewer Server Administration creates a copy of the original folder with the new name you have given it and moves all the projects you can access from the original folder into the new one. The projects that you cannot access remain in the original folder. You will see only the new folder with the projects you can access. Users who can access all projects will see your new folder as well as the original folder with the projects that only they can access.

Refreshing the project list

Figure 1-6
Refresh icon

Normally, IBM® SPSS® Data Collection Interviewer Server Administration redraws the project list to reflect the changes you make. If this doesn't happen, click the Refresh icon to refresh the project list manually.

Creating a new project

When you create a new project, you define what type of project it is, give it a name and description, specify a customer account, and define who may work on it. You may also place the project in a folder of similar or related projects — for example, in a folder of projects for a particular customer, or in a folder of projects to do with a particular topic.

Note: Folders are a visual management tool only. Placing a project in a folder does not create a subfolder in your projects folder on the disk.

There are two types of projects:

- **Interviewer Server.** These are projects for which you will be using IBM® SPSS® Data Collection Interviewer Server to gather data. (Interviewer Server includes tools for building the questionnaire, running test interviews, and viewing topline tables.) If you also have IBM® SPSS® Data Collection Survey Tabulation, you can use Survey Tabulation to analyze the survey data that you collect using Interviewer Server.
- **Analyze existing data.** These are projects for which you want to use Survey Tabulation to perform in-depth analysis of survey data after it has been collected (for example, using another data collection tool). The data can be in any format supported by the IBM® SPSS® Data Collection Data Model.

The instructions for setting up the Interviewer Server and analysis projects are given separately, because the procedures are somewhat different.

Creating a new Interviewer Server project

These instructions cover setting up a project for use with IBM® SPSS® Data Collection Interviewer Server. If you also have IBM® SPSS® Data Collection Survey Tabulation installed, the project will automatically be set up for use with Survey Tabulation. This means that you will be able to define your analyses in Survey Tabulation even before you start interviewing. It is safe to use Survey Tabulation to analyze your data while you are collecting it, because Survey Tabulation always opens the data in read-only mode. (When you create new variables in Survey Tabulation, they are stored separately from the main project data.)

Note: Project names are unique to each customer account. After deleting a project, other users will not be able to create a new project, with the same name as the deleted project, unless they are assigned to the same customer account in which the deleted project was created.

Project names and IDs

Every project has a name and an ID. The name is the name by which the project will be identified in IBM® SPSS® Data Collection Interviewer Server Administration. It is for display purposes only and you can change it at any point in the project's life cycle. The ID is the name that the Interviewer Server Administration activities will use when creating files associated with the project, so it is usual to make it the same as the project name if possible. Once the ID has been set you cannot change it even if you change the project name.

Because the project ID is used in filenames it has to be something that is valid for filenames. The rules are these:

- The ID must be unique.
- It must start with an English letter (A to Z, a to z).
- The rest of the name may contain English letters and the digits 0 to 9.

If the project name meets these criteria, Interviewer Server Administration uses it as the project ID (you can change this if you wish). If not, Interviewer Server Administration copies the name and then makes the following changes in an attempt to make it acceptable. Once an acceptable ID emerges, no further changes are made.

1. Remove invalid characters (non-English letters or punctuation, for instance). If this results in a zero-length ID, Interviewer Server Administration generates an ID based on your user name as described below.

2. If the ID starts with a number Interviewer Server Administration inserts the letter A at the start of the ID.

3. If the ID is longer than 64 characters it is truncated to that length.

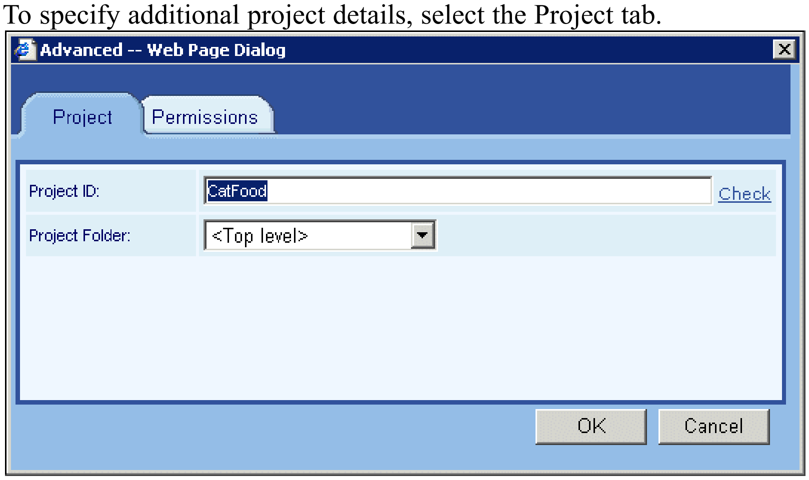
4. If the ID is not unique Interviewer Server Administration appends a number in the range 1 to 999. Numbers are chosen in sequence starting with 1 so this allows for 999 files with the same root to the filename (ID_1 to ID_999, for instance). If adding a number would make the ID longer than 64 characters, Interviewer Server Administration removes characters from the end of the ID before appending the number.

If none of these changes results in a valid project ID, Interviewer Server Administration generates an ID based your user name and the date and time, modifying it to produce a unique and valid ID if necessary — for example, *ben0501191226*.

Note: When customer accounts are employed, the generated ID is prefixed by the customer account name (for example, *customeraccountname_ben0501191226*).

Creating a new Interviewer Server project

- Click the New Project icon. This opens the New Project dialog box.
- In Project Type, choose Interviewer Server (Data Collection).
- In Name, enter the project's name as you want it to appear in the project list.
- In Customer Account, select a customer account for the project. If you are not using customer accounts, select the System account.
- Optionally, in Description, type a more detailed description of the project.
- If you want to do any of the following, click Advanced. If not, click OK to create the project using the default settings.
  - Specify additional project details such as the project ID or the project folder.
  - Specify which roles may access the project. The default is for only the creator and members of the DPMAdmins and CustomerAccountAdmins roles to have access.
- To specify additional project details, select the Project tab.

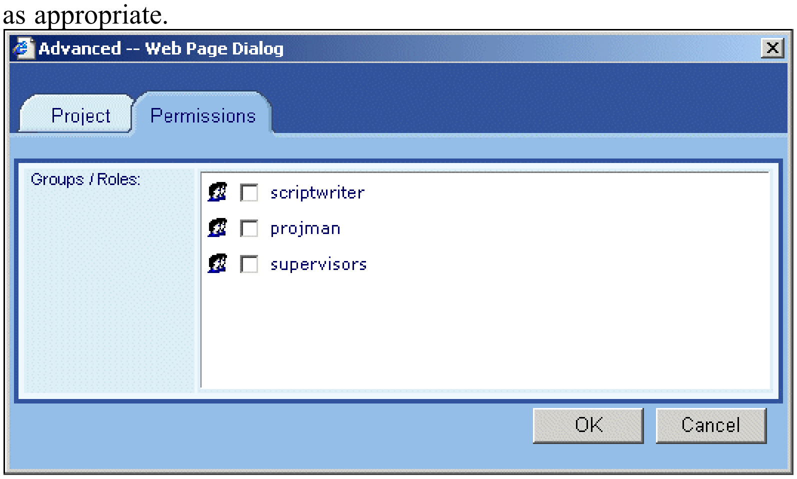


- If you do not like the Project ID that Interviewer Server Administration has chosen, enter the name that you want to use as the basename for all files associated with this project.
- Click Check to verify that the name you have chosen is valid.
- The Project Folder field allows you to group projects using characteristics of your choice. How you use this field depends on your permissions.

- Everyone can choose an existing folder name to place the project in that folder, or <Top level> to create a project in the top level of the project hierarchy.
- If you have permission to manage project folders, you may choose <Create new folder> to place the project in a new folder with a name of your choice (enter the folder name when prompted to do so).

  Note: The hierarchical project list is a display feature only. It does not create a hierarchical structure on the disk. All projects are created in your user folder (for example, in Users\ben\Projects) even if they are displayed as being in a folder in the project list.

▶ To specify which roles may access the project, select the Permissions tab and then select roles as appropriate.



▶ Click OK to close the Advanced dialog box and then click OK again to create the project.

Creating a New Analysis Project

This section covers creating a non-IBM® SPSS® Data Collection Interviewer Server project.

Before you set up a non-Interviewer Server project, you need to identify the data files you are going to use and, if necessary, prepare them for **uploading**. For more information, see the topic Preparing Your Data Files For Uploading on p. 15.

▶ **Setting up a project involves three main steps:**

- Create the new project
- Check the uploaded files into the Shared folder
- Create and populate a test table

After you have followed these steps, your project will be available to all users who belong to the roles you selected as having access to the project.

Tip: Sample data is included with the IBM® SPSS® Data Collection Developer Library, which is available as a separate installation and as a free download. The samples include a backed-up relational MR (RDB) database and associated Metadata Document (*.mdd*) file, IBM® SPSS® Quanvert™ databases, IBM® SPSS® Data Collection XML data sets, IBM® SPSS® Statistics

.sav, and IBM® SPSS® Quancept™ *.qdi* and *.drs* files. The Data Collection Developer Library provides detailed step-by-step instructions for setting up IBM® SPSS® Data Collection Interviewer Server Administration projects for each of the main sample data sets.

Preparing Your Data Files For Uploading

Before you create your (non-IBM® SPSS® Data Collection Interviewer Server) data analysis project in IBM® SPSS® Data Collection Interviewer Server Administration, you need to make sure that any data files that are required are ready for **uploading**. You can upload files individually or in a *.zip* file. Using a *.zip* file is recommended when you upload large files. If you use a *.zip* file, Interviewer Server Administration will automatically unzip the *.zip* file and delete it, after the upload is finished. You can upload files from your own machine or from any other suitable network location.

IBM® SPSS® Data Collection Survey Tabulation uses the IBM® SPSS® Data Collection Data Model to access the underlying data, which can be, for example, an SPSS *.sav* file, a IBM® SPSS® Quanvert™ database, a relational MR (RDB) database, IBM® SPSS® Quancept™ data stored in *.qdi* and *.drs* files, etc. The Data Model handles **case data** (which stores the actual responses) and **metadata** (which describes the case data and stores the question and category texts, etc.) separately. Survey Tabulation requires a metadata source as well as a case data source. The metadata source can be an IBM® SPSS® Data Collection Metadata Document (*.mdd*) file or any other metadata format for which a suitable read-enabled Metadata Source Component (MDSC) is available. The case data can be in any format for which a suitable read-enabled Case Data Source Component (CDSC) is available.

Although Survey Tabulation can read metadata in any format for which a suitable read-enabled MDSC is available, there are performance advantages in using metadata in an *.mdd* file. This is because when the metadata for the project is stored in an *.mdd* file, Survey Tabulation caches the metadata and this leads to significantly improved performance. The caching persists between sessions and is updated when you create and edit variables.

Survey Tabulation does not cache the metadata when it is stored in a proprietary format (such as Quanvert, Quancept *.qdi*, or SPSS *.sav*). However, you can use MDM Explorer to create an *.mdd* from the proprietary metadata for use in the Survey Tabulation project. You would then need to upload the *.mdd* file you create with the other data files for the project, and configure the project to use the *.mdd* file. MDM Explorer is a tool that comes with the IBM® SPSS® Data Collection Developer Library, which is available on the IBM SPSS Data Collection Server DVD-ROM and also as a free download from Data Collection Developer Library.

Here are some notes to help you prepare data files of the main data formats that are suitable for use with Survey Tabulation:

Quanvert database. Quanvert databases come in two formats—**packed** and **unpacked**. You can tell the difference between a packed and unpacked Quanvert database because a packed database consists of a single file with a *.pkd* filename extension whereas an unpacked database consists of many files including a header file called *qvinfo*. Survey Tabulation can support both formats.

When using the unpacked format it is advisable to pack the files before uploading, but note that the packed format is not supported for Quanvert multiprojects.

There are some additional manual steps for setting up Quanvert multiprojects for use in Survey Tabulation. For more information, see the topic Setting up a IBM SPSS Quanvert Multiproject for Use in IBM SPSS Data Collection Survey Tabulation on p. 22.

SPSS .sav file. When you are using a *.sav* file that you created using the Data Model (for example, using IBM® SPSS® Data Collection Paper - Scan Add-on Transfer or exporting Interviewer Server data), it is **always** preferable to read it using the *.mdd* file that was used when creating it (that is the output metadata file if you created the *.sav* file using a DMS file). This means that the variables (and their names) will match those in the *.mdd* file and will therefore be easier to understand. For example, several variables may be created in the *.sav* file from a single text variable in the *.mdd* file. When you access the *.sav* file in Survey Tabulation using the *.mdd* file, these variables will be recombined and presented as one variable.

Note: For some languages you will also need to upload a *.sav.ini* file specifying the language of the *.sav* file so that Survey Tabulation can read it, for example:

```
[mrSavDsc]
SavLanguage=JPN
```

The name of this file must be *<savfilename>.sav.ini*, for example, myproject.sav.ini.

For further details, see the *Language Handling by SPSS Statistics SAV DSC* section in the Data Collection Developer Library.

Quancept QDI/DRS file. When you are using Quancept data, generally the metadata is in the form of a *.qdi* file and the case data is in a *.drs*, *.drz* or *.dru* file.

Data Collection XML format. By default, Survey Tabulation uses the hierarchical view when you work with case data in the XML format. However, when you export data to XML, the data is generally written in the flat (*VDATA*) format. The Data Collection Developer Library comes with a sample mrScriptBasic file (called *CdscHdataTransfer.mrs*) that you can use to export hierarchical data to an XML file in the hierarchical (*HDATA*) format. Alternatively, you can select the flat view within Survey Tabulation. When you use case data in the XML format, the metadata is generally in the form of an *.mdd* file.

Relational MR database. When the case data is stored in a relational MR database, the metadata is generally stored in an *.mdd* file and is generally the only file you need to upload. If the database is in the form of an SQL Server backup, you need to restore it.

Surveycraft QDT/VQ files. When you upload IBM® SPSS® Surveycraft™ data, you must upload both the *.qdt* and *.vq* files. You may also want to create a metadata (*.mdd*) file and upload that as well. This does not increase the initial speed of Survey Tabulation, but can improve performance when you next open the project in Survey Tabulation. You must have write access to the *.qdt* and *.vq* files that you want to upload.

For detailed information about the **DSCs** that come with the Data Model and how they interpret the underlying data, see the Data Collection Developer Library.

Creating the New Project in IBM SPSS Data Collection Interviewer Server Administration

This topic provides information about creating a IBM® SPSS® Data Collection Interviewer Server Administration project that uses data that is not part of an IBM® SPSS® Data Collection Interviewer Server project. For instructions on creating a new questionnaire project, see Creating a New Questionnaire Project.

Project Names and IDs

Every project has a name and an ID. The name is the name by which the project will be identified in Interviewer Server Administration. It is for display purposes only and you can change it at any point in the project's life cycle. The ID is the name that the Interviewer Server Administration activities will use when creating files associated with the project, so it is usual to make it the same as the project name if possible. Once the ID has been set you cannot change it even if you change the project name.

Because the project ID is used in filenames it has to be something that is valid for filenames. The rules are these:

- The ID must be unique.
- It must start with an English letter (A to Z, a to z).
- The rest of the name may contain English letters and the digits 0 to 9.

If the project name meets these criteria, Interviewer Server Administration uses it as the project ID (you can change this if you wish). If not, Interviewer Server Administration copies the name and then makes the following changes in an attempt to make it acceptable. Once an acceptable ID emerges, no further changes are made.

1. Remove invalid characters (non-English letters or punctuation, for instance). If this results in a zero-length ID, Interviewer Server Administration generates an ID based on your user name as described below.
2. If the ID starts with a number Interviewer Server Administration inserts the letter A at the start of the ID.
3. If the ID is longer than 64 characters it is truncated to that length.
4. If the ID is not unique Interviewer Server Administration appends a number in the range 1 to 999. Numbers are chosen in sequence starting with 1 so this allows for 999 files with the same root to the filename (ID_1 to ID_999, for instance). If adding a number would make the ID longer than 64 characters, Interviewer Server Administration removes characters from the end of the ID before appending the number.

If none of these changes results in a valid project ID, Interviewer Server Administration generates an ID based your user name and the date and time, modifying it to produce a unique and valid ID if necessary — for example, *ben0501191226*.

Note: When customer accounts are employed, the generated ID is prefixed by the customer account name (for example, *customeraccountname_ben0501191226*).

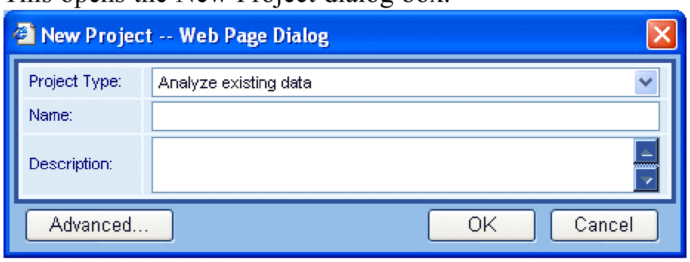
To Create the New Project in Interviewer Server Administration:

- Make sure that your data files are ready for uploading. For more information, see the topic Preparing Your Data Files For Uploading on p. 15.

- On the toolbar at the top of the My Projects list, click the New Project button:

Figure 1-7
New Project button

This opens the New Project dialog box.



- From the Project Type drop-down list, select Analyze existing data.

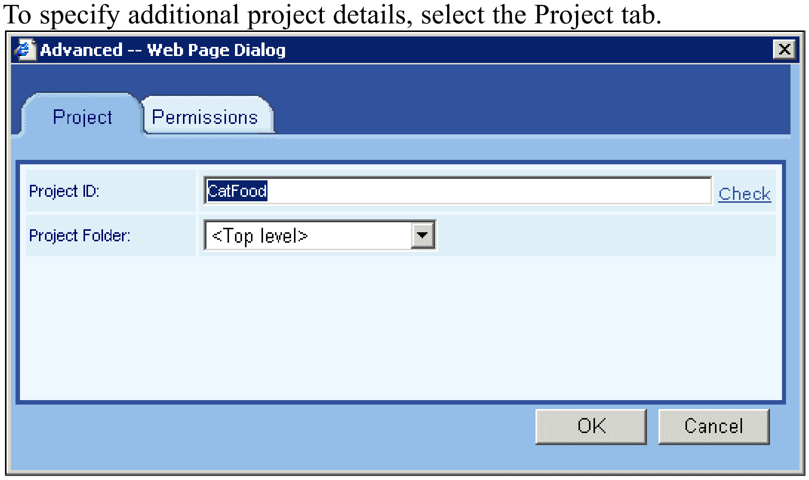
- In Name, enter the project's name as you want it to appear in the project list.

- In Customer Account, select a customer account for the project. If you are not using customer accounts, select the System account.

- Optionally, in Description, type a more detailed description of the project.

- If you want to do any of the following, click Advanced. If not, click OK to create the project using the default settings.
  - Specify additional project details such as the project ID or the project folder.
  - Specify which roles may access the project. The default is for only the creator and members of the DPMAdmins and CustomerAccountAdmins roles to have access.

- To specify additional project details, select the Project tab.



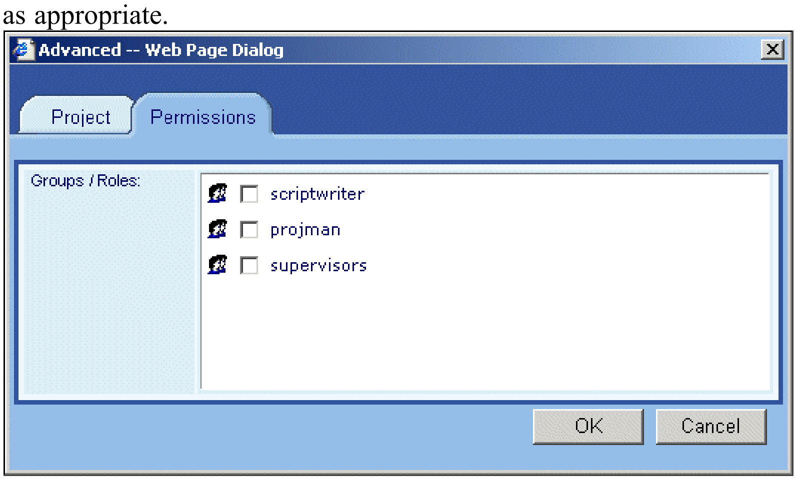
- If you do not like the Project ID that Interviewer Server Administration has chosen, enter the name that you want to use as the basename for all files associated with this project.

- Click Check to verify that the name you have chosen is valid.

- The Project Folder field allows you to group projects using characteristics of your choice. How you use this field depends on your permissions.
  - Everyone can choose an existing folder name to place the project in that folder, or <Top level> to create a project in the top level of the project hierarchy.
  - If you have permission to manage project folders, you may choose <Create new folder> to place the project in a new folder with a name of your choice (enter the folder name when prompted to do so).

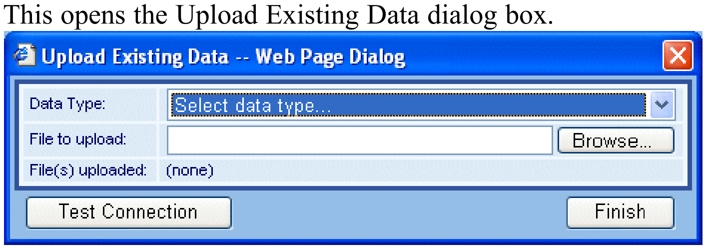
    Note: The hierarchical project list is a display feature only. It does not create a hierarchical structure on the disk. All projects are created in your user folder (for example, in Users\ben\Projects) even if they are displayed as being in a folder in the project list.

- To specify which roles may access the project, select the Permissions tab and then select roles as appropriate.



- Click OK to close the Advanced dialog box and then click OK again to create the project.

  This opens the Upload Existing Data dialog box.



- In Data Type, select the type of data you will be uploading.

- In File to upload, click Browse. Then browse to where your data files are located and double-click the file you want to upload. The file begins to upload immediately. When the upload is complete, the name of the file appears in the File(s) uploaded list.

  You can upload only one file at a time, but when each file has been uploaded, you have the option to upload another one. If you upload a *.zip* file, Interviewer Server Administration automatically unzips the file and deletes it when the upload is complete.

- After uploading an *.mdd* file whose name is different from the project ID, you will be asked whether you want to change the name of the *.mdd* file to match the project ID. Select Cancel.

- If you want to check that Interviewer Server Administration can connect to the data files you have uploaded, click Test Connection. In most cases the connection will work straight away and you will see a message confirming this. If the connection fails, you will need to use EditProject to change the connection properties. For more information, see the topic Changing Connection Properties on p. 47.

- Click Finish.

  This creates the project and adds it to the list of Interviewer Server Administration projects.

Checking the Uploaded Files into the Shared Folder

This topic provides information about a step that you need to perform to make a project available to other users. This step is not necessary if you do not want other users to have access to the project or when you are setting up an IBM® SPSS® Data Collection Interviewer Server projects that will also be used with IBM® SPSS® Data Collection Survey Tabulation. For more information, see the topic Creating a new Interviewer Server project on p. 12.

After you have uploaded your data files and created the IBM® SPSS® Data Collection Interviewer Server Administration project, you need to check the uploaded files into the shared folder in order for other users to be able to work with this project.

To Check the Uploaded Files into the Shared Folder:

- Select the new project in the Interviewer Server Administration project list and click Files.

  This opens the Files activity, which lists the uploaded files.

- Select each file that is required by the project.

- Choose
  Actions > Check In

  This checks the files into the shared folder.

- Click the Home button on the Files toolbar to close the activity.

- Select the project in the Interviewer Server Administration project list.

- Click the Unlock Project button:
  

Your project will now be available to the users who have the roles you selected for the project.

Creating and Populating a Test Table

After setting up a non-IBM® SPSS® Data Collection Interviewer Server project for use in IBM® SPSS® Data Collection Survey Tabulation, you should open the project in Survey Tabulation in order to test that the connection string has been set up correctly and the data is accessible. This step is not generally necessary when you are using an Interviewer Server project in Survey Tabulation, because the connection string is created for you.

To Create and Populate a Test Table in Survey Tabulation:

▶ Select the new project and click Survey Tabulation.

There will be a short delay while Survey Tabulation initializes.

▶ If you see the message "Server error: Failed to load data", it indicates that Survey Tabulation was not able to connect to the metadata. You will be returned to IBM® SPSS® Data Collection Interviewer Server Administration, where you should first check that you have checked the project's data files into the shared folder. If the files have been checked in, use the project editor to check and, if necessary, correct the connection properties for the metadata source. For more information, see the topic Edit Project on p. 45.

▶ If you see the main Survey Tabulation screen, including the list of variables, it means that Survey Tabulation is able to connect to the project's metadata correctly. You now need to create and populate a simple table (for example, one that crosstabulates two simple categorical variables) to check that Survey Tabulation is able to connect to the project's case data. For information on creating and populating a table, see the Survey Tabulation documentation.

▶ If the table populates without a problem, it means that the project is set up correctly.

▶ If you get an error when you attempt to populate the table, you should make a note of the error message, return to Interviewer Server Administration, and then use the project editor to check and, if necessary, correct the connection properties for the case data source. For more information, see the topic Edit Project on p. 45.

Tips:

When there is an error populating a simple table immediately after setting up the project, it generally means that there is a problem connecting to the case data. This may be because there is an error in the connection properties for the case data, a problem with the case data itself, or incorrect access permissions.

Generally the first part of the error message comes from the Table Object Model (TOM) and the related Table Aggregator component. Sometimes there is an additional error message from the CDSC that is used to access the case data, and this can sometimes give a clue to the cause of the specific problem.

Aggregator Error 296: Input data doesn't exist (neither VDATA nor HDATA found). This generally means the case data specified in the connection string cannot be found. If you are using a file-based case data format, check that you specified the correct file and location and that the file is present. Check that you specified the right type of data (that you didn't select SPSS Statistics SAV DSC when you meant IBM® SPSS® Data Collection DRS DSC, etc.) If you are using RDB DSC 2, check the following:

- In the OLE DB connection string specified for the Case Data Location, is the *Initial Catalog* property set to the name of the database?
- In the OLE DB connection string specified for the Case Data Location, is the *Data Source* property set to the name of the server on which the SQL Server database is located?
- Is the Case Data Project correct? In a project that originated in Interviewer Server, this is typically the same as the database name.
- Do you have appropriate access permissions for the SQL Server database?

Aggregator Error 239: Failed to initialize CDSC. This message is generally followed by a message from the CDSC that should provide more information about the problem. When attempting to connect to an XML file, this message may indicate that the specified file does not exist. When attempting to connect to an RDB database, this message may indicate that you have specified the Case Data Project incorrectly.

Aggregator Error 278: Data table HDATA requested but not available. If you are attempting to connect to an XML file, this generally means that data is in the flat (*VDATA*) format. This means you need to change to use the flat view within Survey Tabulation. For more information, see the topic Preparing Your Data Files For Uploading on p. 15. Sometimes this error message also occurs when you have selected the wrong case data type (for example, if you accidentally select RDB DSC 2 instead of SPSS Statistics SAV DSC).

For detailed information about the CDSCs that come with the IBM® SPSS® Data Collection Data Model, their error messages, and known problems, see the IBM® SPSS® Data Collection Developer Library.

Setting up a IBM SPSS Quanvert Multiproject for Use in IBM SPSS Data Collection Survey Tabulation

Setting Up the Multiproject in IBM® SPSS® Quanvert™

If you want to use a Quanvert multiproject in IBM® SPSS® Data Collection Survey Tabulation, you need to make sure that the subprojects are in subfolders of the main folder you specify when you create the multiproject and that this folder is given the name you want to use for the project in IBM® SPSS® Data Collection Interviewer Server Administration. This means that you must make sure that the folder name you specify when you create the multiproject in Quanvert meets the requirements for a valid Interviewer Server Administration project name. For more information, see the topic Creating the New Project in IBM SPSS Data Collection Interviewer Server Administration on p. 17.

For example, suppose you create the multiproject in the following folder:

C:\QVTW*MYPROJECT*

The subprojects would need to be located in:

C:\QVTW\MYPROJECT*MySubproject1*
C:\QVTW\MYPROJECT*MySubproject2*
C:\QVTW\MYPROJECT*MySubproject3*

where *MYPROJECT* is the name you are going to use for the Interviewer Server Administration project and *MySubproject1*, *MySubproject2*, and *MySubproject3* are the names of the subproject folders.

Note that this folder structure is not recommended for use in Quanvert, because it makes it easy to delete the subprojects accidentally. However, this folder structure is a requirement for using a Quanvert multiproject in Survey Tabulation.

Setting Up the Project in Interviewer Server Administration

Rather than uploading the files in Interviewer Server Administration, you need to ask your system administrator to copy the files manually to the shared folder for this project on the Interviewer Server Administration server so that the relative folder structure is maintained. The folder structure on Interviewer Server Administration should then look like this:

\\fmroot\Shared\Projects\MYPROJECT
\\FMRoot\Shared\Projects\MYPROJECT\MySubproject1
\\FMRoot\Shared\Projects\MYPROJECT\MySubproject2
\\FMRoot\Shared\Projects\MYPROJECT\MySubproject3

You can now follow the normal steps for setting up your Survey Tabulation project in Interviewer Server Administration, but skipping the steps for uploading files and checking the uploaded files into the shared folder.

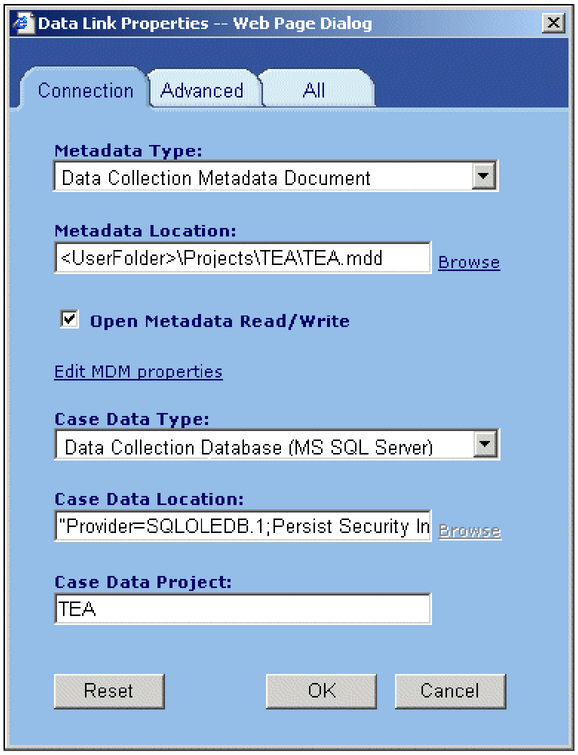
Data Link Properties Dialog Box

When you access data using the IBM® SPSS® Data Collection Data Model, there are a number of connection properties that need to be specified. The Data Link Properties dialog box makes it easy to set up the connection properties.

The Data Link Properties dialog box has three tabs—Connection, Advanced, and All.

Data Link Properties Dialog Box: Connection Tab

You use the Connection tab to define the name, location, and type of the data to which you want to connect.



Metadata Type. Defines the type of metadata. The drop-down list shows the types of metadata for which you have a metadata source component (MDSC). The default options are:

- **None.** Choose this option if you want to connect to case data only.
- **MR Metadata Document.** Selects metadata that is in the standard IBM® SPSS® Data Collection Data Model format, which is a questionnaire definition (*.mdd*) file.
- **ADO Database.** Selects metadata that is in an ActiveX Data Objects (ADO) data source.
- **Data Collection Log File.** Selects metadata in a standard IBM® SPSS® Data Collection log file.
- **Data Collection Participation Database.** Selects metadata that is in a IBM® SPSS® Data Collection Interviewer Server Administration project's Sample and HistoryTable tables.
- **Data Collection Scripting File.** Selects metadata that is in a mrScriptMetadata file.
- **In2data Database.** Selects metadata that is in an In2data database (*.i2d*) file.
- **Quancept Definitions File (QDI).** Selects metadata in a IBM® SPSS® Quancept™ *.qdi* file using the QDI/DRS DSC.
- **Quancept Script File.** Writes the metadata in an MDM document to a Quancept script (*.qqc*) file.
- **Quantum Specification.** Writes the metadata in an MDM document to a IBM® SPSS® Quantum™ specification.
- **Quanvert Database.** Selects metadata that is in a IBM® SPSS® Quanvert™ database.
- **Routing Script File.** Writes the routing section of an MDM document to a script that defines the routing required for interviewing.

- **SPSS Statistics File (SAV).** Selects metadata that is in an IBM® SPSS® Statistics *.sav* file.
- **Surveycraft File.** Selects metadata that is in a IBM® SPSS® Surveycraft™ Validated Questionnaire (*.vq*) file.

Metadata Location. The name and location of the metadata. The way you specify this depends on the type of metadata that you selected in the previous drop-down list:

- **Data Collection Metadata Document.** The name and location of the *.mdd* file.
- **ADO Database.** The name and location of a *.adoinfo* file, which is an XML file that specifies the connection string for the target data source and the name of the target table in that data source.
- **Data Collection Log File.** The name and location of the log file. Typically log files have a *.tmp* filename extension. However, some log files may have another filename extension. If necessary, you can rename the file so that it has a *.tmp* filename extension.
- **Data Collection Participation Database.** The name and location of a Participants Report Document (*.prd*) file, which is an XML file that specifies the connection string and the names of the table and columns to be used.
- **Data Collection Scripting File.** The name and location of the mrScriptMetadata file. Typically these files have an *.mdd* or *.dms* filename extension.
- **In2data Database.** The name and location of the *.i2d* file.
- **Quancept Definitions File (QDI).** The name and location of the *.qdi* file.
- **Quancept Script File.** The name and location of the *.qqc* file.
- **Quantum Specification.** The location of the Quantum specification files.
- **Quanvert Database.** The name and location of the *qvinfo* or *.pkd* file.
- **Routing Script File.** The name and location of the routing script file.
- **SPSS Statistics File (SAV).** The name and location of the *.sav* file.
- **Surveycraft File.** The name and location of the *.vq* file.

Click Browse to select the file in the Open dialog box.

Open Metadata Read/Write. By default, the metadata is opened in read-only mode. Select this option if you want to be able to write to it. When you open some types of data (for example, a Quanvert database) the metadata is always opened in read-only mode.

Edit MDM Properties. Click this button to open the MDM Properties dialog box, in which you can specify the versions, language, **context**, and **label type** to use. For more information, see the topic Data Link Properties: MDM Properties on p. 27.

Case Data Type. Defines the type of case data. The drop-down list shows all of the types of case data for which you have a case data source component (CDSC). The default options are:

- **ADO Database.** Reads case data from an ActiveX Data Objects (ADO) data source.
- **Delimited Text File (Excel).** Writes case data in tab-delimited format to a *.csv* file.
- **Data Collection Database (MS SQL Server).** Reads and writes case data in a Data Collection relational database in SQL Server. This option can be used to read data collected using IBM® SPSS® Data Collection Interviewer Server.
- **Data Collection Log File.** Selects the Log DSC, which enables you to read Data Collection log files.

- **Data Collection XML Data File.** Reads and writes case data in an XML file. Typically, you use this option when you want to transfer case data to another location.
- **In2data Database.** Reads case data from an In2data Database (*.i2d*) file.
- **Quancept Data File (DRS).** Reads case data in a Quancept*.drs*, *.drz*, or *.dru* file using the QDI/DRS DSC.
- **Quantum Data File (DAT).** Selects the Quantum DSC, which reads and writes case data in a Quantum-format ASCII file.
- **Quanvert Database.** Selects the Quanvert DSC, which reads data in a Quanvert database.
- **SPSS Statistics File (SAV).** Reads and writes case data in an SPSS Statistics *.sav* file.
- **Surveycraft File.** Reads case data from a Surveycraft data file.

Tip: If you have specified a Metadata Type and a Metadata Location, and the default data source in your metadata refers to the case data that you want to connect to, you don't need to specify a Case Data Type or a Case Data Location.

Case Data Location. The name and location of the case data. The way you specify this depends on the type of case data that you selected in the previous drop-down list:

- **ADO Database.** The OLE DB connection string for the ADO data source. To build this string, click Browse, which opens a second Data Link Properties dialog box in which you can choose the options for your data source. For example, to connect to a Microsoft Access database or a Microsoft Excel file, select Microsoft OLE DB Provider for ODBC Drivers in the Provider tab and click the Build button in the Connection tab to build a connection string that uses the Machine Data Source called "MS Access Database" or "Excel Files" as appropriate. If your data source is a Microsoft SQL Server database that is not a Data Collection relational database, select Microsoft OLE DB Provider for SQL Server in the Provider tab and enter the server name and database name in the Connection tab. Then click OK to close the second Data Link Properties dialog box and return to the Connection tab of the first Data Link Properties dialog box.
- **Delimited Text File (Excel).** The name and location of the *.csv* file.
- **Data Collection Database (MS SQL Server).** This must be an OLE DB connection string. For more information, see the topic Connecting to a Relational MR Database Using RDB DSC 2 on p. 31.
- **Data Collection Log File.** The name and location of the log file. Typically log files have a *.tmp* filename extension. However, some log files may have another filename extension. If necessary, you can rename the file so that it has a *.tmp* filename extension.
- **Data Collection XML Data File.** The name and location of the *.xml* file.
- **In2data Database.** The name and location of the *.i2d* file.
- **Quancept Data File (DRS).** The name and location of the *.drs*, *.drz*, or *.dru* file.
- **Quantum Data File (DAT).** The name and location of the *.dat* file. If a *.dau* file is created, it will have the same name, but with the file name extension of *.dau*.
- **Quanvert Database.** The name and location of the *qvinfo* or *.pkd* file.

- **SPSS Statistics File (SAV).** The name and location of the *.sav* file.
- **Surveycraft File.** The name and location of the Surveycraft Validated Questionnaire (*.vq*) file. The Surveycraft *.qdt* file, which contains the actual case data, must be in the same folder as the *.vq* file.

Click Browse if you want to browse to the location of the case data in a dialog box.

Case Data Project. This text box should be blank, unless you are connecting to one of the following case data types:

- **ADO Database.** If you are connecting to a Microsoft SQL Server database (that is not a Data Collection relational database) or a Microsoft Access database, enter the name of the database table that you want to use. If you are connecting to a Microsoft Excel file, enter the name of the worksheet that you want to use, for example, Sheet1. Depending on the version of Excel installed, you may have to add a dollar sign ($) after the worksheet name for the connection to be successful, for example, Sheet1$.
- **Data Collection Database (MS SQL Server).** Enter the name of the project that you want to use.

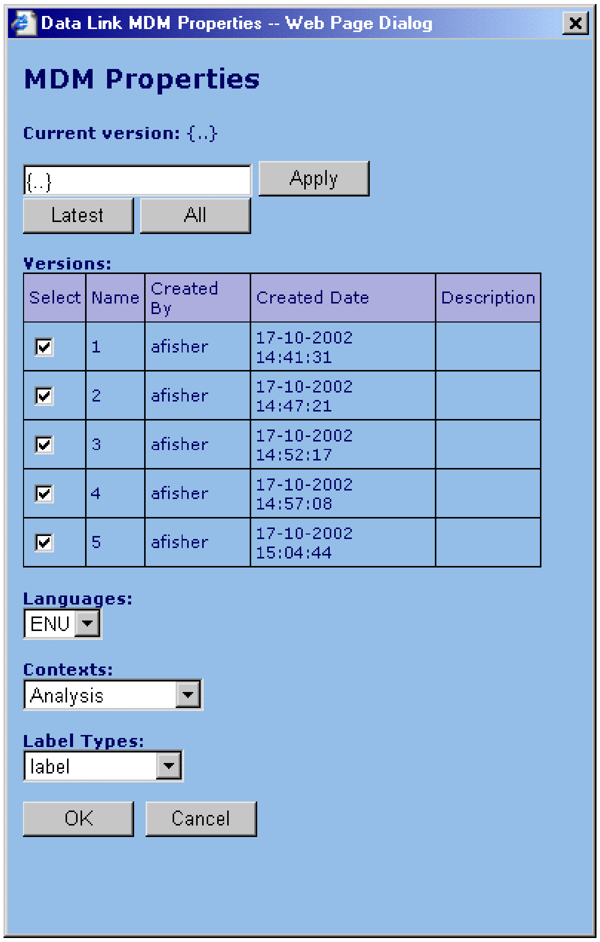
For detailed information about the **DSCs** that come with the Data Model and how they interpret the underlying data, see the IBM® SPSS® Data Collection Developer Library.

Data Link Properties: MDM Properties

You use the MDM Properties dialog box to specify the version, language, context, and label type that you want to use when you connect to a questionnaire definition (*.mdd*) file (also known as IBM® SPSS® Data Collection Metadata Document file). You open this dialog box by clicking Edit MDM Properties on the Connection tab in the Data Link Properties dialog box.

Questionnaire definition (*.mdd*) files typically contain **versions**, which record any changes to the content of the questionnaire. Typically, when the questionnaire changes (for example, a question or category is added or deleted), a new version is created and when the changes are complete, the version is locked.

Using a combination of some or all of the versions is useful when, for example, you want to export case data for more than one version and there have been changes to the variable and category definitions that mean that case data collected with one version is not valid in another version. Selecting all of the versions for which you want to export the case data, means that generally you can export the case data collected with the different versions at the same time without encountering validity errors due to the differences between the versions. However, depending on the version changes, some validity errors may still be encountered.



Current version. Displays an expression that represents the selection you have chosen. You can optionally select the versions you want to use by typing an expression directly into the text box.

Syntax	Description
..	Specifies all versions
v1, *v2*, *v3*, *v4*	Specifies individual versions
v1..*v2*	Specifies an inclusive range of versions
^*v1*..*v2*	Excludes a range of versions
	Specifies the most recent version.

You can specify a combination of individual versions, and ranges to include or exclude. For example, the following specifies version 3:2 and all versions from 4:5 to 7:3 with the exception of versions 7 through 7:2:

```
3:2, 4:5..7:3, ^7..7:2
```

When there is a conflict between the versions, the order of precedence is taken from the order in which versions are specified in the expression, with the rightmost versions taking precedence over the leftmost. For example, if a category label differs in the versions you select, the text in the version with the higher precedence will be used. However the order of questions and categories is always taken from the most recent version and there is special handling of changes to loop definition ranges and the minimum and maximum values of variables.

For more information, see the topic Version Expressions on p. 29.

Latest. Select this option if you want to use the most recent version.

All. Select this option if you want to use a combination (superset) of all of the available versions. (This is sometimes called a **superversion**).

Versions. A list of all of the versions that are available. For each version, the following information is shown:

- **Name.** The version name. Version names are made up of a combination of the major version and minor version numbers in the form *Major#:Minor#*, where *Major#* is the number of the major version and *Minor#* is the number of the minor version. Changes in the major version number indicate that the structure of the case data has changed (for example, variables or categories have been added or deleted) whereas changes in the minor version number indicate that the changes affect the metadata only (for example, a question text has been changed). Version names are created automatically when a version is locked. A version that has not been locked is always called *LATEST*.
- **Created by.** The ID of the user who created the version.
- **Created Date.** This shows the date and time at which the version was locked.
- **Description.** When present, this is a text that gives information about the version.

Languages. Select the language you want to use. You can change the language only if there is more than one language defined.

Contexts. Select the user context you want to use. The user context controls which texts are displayed. For example, select Question to display question texts, or Analysis to display shorter texts suitable for displaying when analyzing the data.

LabelTypes. Select the label type you want to use. You should generally select the Label option.

Version Expressions

When you open a metadata (*.mdd*) file, you can specify the version or versions you want to use. This topic describes the syntax that you use to specify the version or versions.

You can specify a single version using its name. Version names are made up of a combination of the major version and minor version numbers in the form *Major#:Minor#*, where *Major#* is the number of the major version and *Minor#* is the number of the minor version. Changes in the major version number indicate that the structure of the case data has changed (for example, variables or categories have been added or deleted) whereas changes in the minor version number indicate that the changes affect the metadata only (for example, a question text has been changed). Version

names are created automatically when a version is locked. A version that has not been locked is always called *LATEST*.

You can open the latest minor version that belongs to a specified major version by entering the major version number followed by a colon. For example, if there are minor versions 2:1, 2:2, and 2:3, specifying 2: will open minor version 2:3.

You can use an expression to open a superset (sometimes called a **superversion**) of two or more versions. The order in which you specify the versions determines the order of precedence that is used when there is a conflict between versions. (The rightmost versions in the expression take precedence over the leftmost.) For example, if a category label differs in the versions you select, the text in the version with the highest precedence will be used. However the order of questions and categories is always taken from the most recent version and there is special handling of changes to loop definition ranges and the minimum and maximum values of variables between the versions.

The version expression syntax is:

{<version> (, <version>)*}

<version>::= *VersionName* | [^] [*VersionName*] .. [*VersionName*]

where *VersionName* is the name of a major or minor version and ^ indicates that the following range is to be excluded.

You can specify the name of versions that do not exist in a range. MDM will then automatically use the next highest or lowest name it encounters, depending on whether the name is specified at the start or end of the range and whether the range is in ascending or descending sequence.

Examples

Expression	Description
{..}	Include all versions in the MDM Document. If there are no versions, this selects the unversioned Document.
{2, 3, 7}	Include versions 2, 3, and 7 and give highest precedence to version 7, the next highest precedence to version 3, and the lowest precedence to version 2.
{5..1}	Include versions 5 through 1, giving the highest precedence to version 1.
{2..7,9}	Include versions 2 through 7 and version 9.
{2..11,^3:1..5:4}	Include versions 2 through 11 but exclude versions 3:1 to 5:4 inclusive.
{}	Include the most recent version in the MDM Document.
{LATEST}	Select the most recent version in the versions collection, whether or not it is named LATEST. If there are no versions, this selects the unversioned document.
{LASTLOCKED}	Include the most recent locked version in the MDM Document.

EBNF Definition

The syntax for specifying the version or versions to open can be specified using the following Extended Backus-Naur Form (EBNF), which is a notation for specifying the syntax of a language succinctly and precisely:

```
<versionname> ::= <version> | (<vername>:) | <range>
<range> ::= { <range_item>(, <range_item>)* }
<range_item>::= [^]((<version>[..])|([<version>]..[<version>]))
<version> ::= (<vername>[:<vername>]) | LATEST | LASTLOCKED
<vername> ::= Any positive integer value
```

Connecting to a Relational MR Database Using RDB DSC 2

Location connection property

When connecting to a relational MR database using RDB DSC 2, you need to specify the Location connection property using an OLE DB connection string. This should specify the parameters shown in the following table.

Parameter	Description
Provider	This must be set to SQLOLEDB.1.
Integrated Security	This should be set to SSPI.
Persist Security	This should be set to False.
Initial Catalog	The name of the database.
Data Source	The name of the server.

Here is an example of an OLE DB connection string that connects to the Short Drinks sample database:

```
Provider=SQLOLEDB.1;
Integrated Security=SSPI;
Persist Security Info=False;
Initial Catalog=short_drinks;
Data Source=LocalHost
```

MR Init Custom connection property

The *MR Init Custom* connection property can be used to specify whether the connection should favor memory use or speed. The valid settings are:

- **FavorMemory.** Uses server-side cursors so that a single SQL Server connection can be re-used across multiple commands. This mode is slower, but uses less memory (and fewer SQL Server connections) as the number of concurrent commands increases.
- **FavorSpeed.** Uses default cursors, requiring a new connection for each command. This mode is considerably faster than the FavorMemory mode, but does use more memory. The FavorSpeed option also optimizes binding look-up by creating a look-up vector. This is the default setting.

To set this property in the Data Link Properties dialog box, select the All tab, and then double-click the MR Init Custom property. Type the required setting into the Property Value text box and then click OK.

Complete example

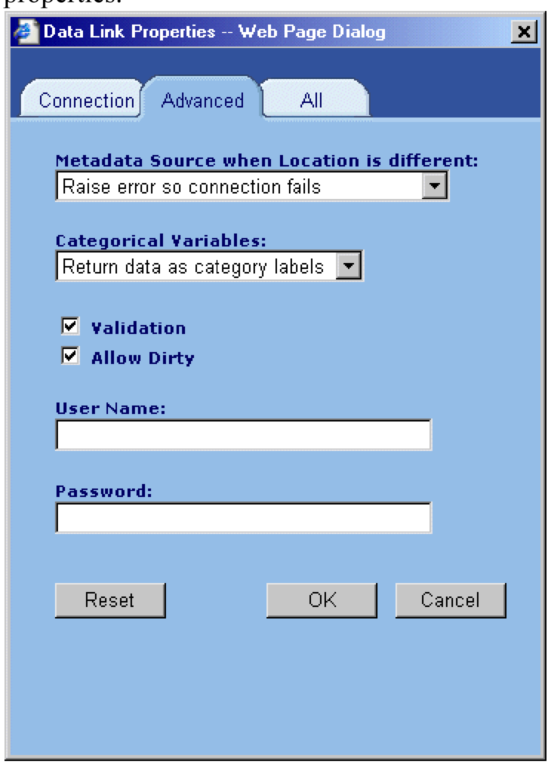
The following is a complete connection string for the Short Drinks sample database. Notice that the *Data Source* property is set to mrRdbDsc2 and the *MR Init Custom* property is set to favor memory:

```
Provider=mrOleDB.Provider.2;
Data Source=mrRdbDsc2;
Location="Provider=SQLOLEDB.1;Integrated Security=SSPI;Persist Security Info=False;Initial Catalog=short_drinks;Data Source=LocalHo
Initial Catalog=[INSTALL_FOLDER]\IBM\SPSS\DataCollection\6\DDL\Data\Mdd\short_drinks.mdd;
MR Init Project=short_drinks;
MR Init Custom=FavorMemory
```

Note that in these examples, each connection property is presented on a separate line for clarity. In practice you should specify the connection string without line breaks.

Data Link Properties: Advanced

You use the Advanced tab in the Data Link Properties dialog box to define additional connection properties.



Metadata Source when Location is Different. The Data Model uses the DataSource object to store details about case data that is associated with an MDM Document (*.mdd* file). This option specifies what should happen if there is no DataSource object in the MDM Document with the same case data type whose location matches the case data location specified on the Connection tab:

- **Use the Data Source (except for location).** This is the default behavior. Select this option if you want to use the first DataSource object of the same type that is encountered and do not want to store the new case data location in it.
- **Use the Data Source and store the new location.** Select this option if you want to use the first DataSource object of the same type that is encountered and store the new case data location in it.
- **Create a new Data Source.** Select this option if you want to create a new DataSource object. This is useful when you do not want to use the same variable names when exporting to SPSS *.sav* as used previously.
- **Raise an Error.** Select this option if you want the connection to fail.

For more information, see the IBM® SPSS® Data Collection Developer Library.

Categorical variables. Specifies whether to display the categories of categorical variables as numeric values or names.

Validation. Select if you want case data to be validated before it is written. Deselect if you do not want any validity checks to be performed on case data before it is written.

Allow Dirty. Select if you have chosen data validation, and you want to run in **dirty mode**. This means that data is accepted even if it has some inconsistencies. Deselect this option to run in **clean mode**, which means that data is rejected if it contains any inconsistencies (for example, if more than one response has been selected in answer to a single response question). The validation that is performed varies according to the CDSC that is selected.

User name. If required, enter your User ID.

Password. If required, enter your password.

Data Link Properties: All

You can use the All tab in the Data Link Properties dialog box to edit all of the available connection properties. However, generally you define the values for the properties on the Connection and Advanced tabs. The following table lists all of the available connection properties.

Property Name	Description	Data Type
Connect Timeout	The length of time, in seconds, to wait for the initialization to complete.	Long
Data Source	The CDSC name to be used with the connection. This is the internal name of the CDSC (for example, mrRdbDsc2). For more information, see the topic DSCs Supplied with the IBM SPSS Data Collection Data Model on p. 38.	String

Property Name	**Description**	**Data Type**
Initial Catalog	The full or relative path to an MDM document (*.mdd*) file or a metadata source for which an MDSC is available (in which case the name of the MDSC should be given in the *MR Init MDSC* property).	String
Location	The name or location of the data source. For file or directory-based data stores, this is the path to the file or directory. The Data Model will treat a relative path as being relative to the metadata file specified in the Initial Catalog property. If Initial Catalog is not set, the Data Model will treat a relative path as being relative to the current directory. The Data Model resolves a relative path to an absolute path before passing it to the CDSC. For OLE DB-based data stores, this is the OLE DB connection string.	String
Mode	This is used internally to filter the CDSCs in the Data Link Properties dialog box, so that only read-enabled CDSCs are listed when the Mode setting is read, for example. Other uses of this property are reserved for future use.	String
Password	The password used to connect to the data source.	String
User ID	The User ID used to connect to the data source.	String
MR Init Allow Dirty	The dirty data write mode. Allowing dirty data generates warnings rather than errors when dirty data is encountered. This setting is ignored if the value of the *MR Init Validation* setting is False. The default value is False.	Boolean
MR Init Category Names	Specifies whether the Data Model is to output category values or names. The default value of 0 indicates that the values are used. A value of 1 indicates that the names are used. This property can be used only if MDM mapped values are selected for the *MR Init Category Values* property.	Long

Property Name	Description	Data Type
MR Init Category Values	Specifies whether the MDM **mapped category value** are used or whether the native values are used. The default value of 0 indicates that the MDM mapped category values should be used. A value of 1 indicates that the native values should be used. If no MDM Document is available, the native values are used. What the native values represent depends upon the DSC and the nature of the underlying case data. The native values may represent the actual raw values stored in the case data. However, this is not always possible and then the native values are identifiers for the categories.	Long
MR Init Custom	This property is used by several IBM® SPSS® Data Collection DSCs to access special settings provided by the client application. For example, this property is used by RDB DSC 2 to specify whether the connection mode should favor memory usage or speed. (The default favors speed.) For more information, search the IBM® SPSS® Data Collection Developer Library (DDL) documentation for the following topics: • Connecting to a Relational MR Database Using RDB DSC 2 • Custom Connection Properties Used by the IBM SPSS Data Collection Data File CDSC • Properties and Settings Used by the SPSS SAV DSC • Custom Connection Properties Used by QDI/DRS DSC • Custom Connection Properties Used by Log DSC • Custom Connection Properties Used by the Triple-S DSC • Custom Connection Properties Used by the Delimited Text DSC • Properties and Settings Used by SAS DSC This property can also be used by third party DSC developers to pass custom initialization information to their DSCs.	String
MR Init Input Locale	The locale ID to use when parsing input data.	Long

Property Name	Description	Data Type
MR Init MDM Access	Specifies the access mode for the MDM document being loaded from a *.mdd* file. A value of 0 specifies that the MDM document should be opened for read-only access. A value of 1 specifies that the MDM document should be opened for read/write access, and any changes will be written back to the *.mdd* file when the connection is closed. A value of 2 specifies that the MDM document should be opened for read/write access, but any changes will *not* be written back to the *.mdd* file. The default access mode is 0, read-only access.	Long
MR Init MDM Context	The current context to be used for the connection.	String
MR Init MDM DataSource Use	The Data Model automatically searches the MDM Document for a DataSource object whose CDSCName property matches the value specified in the *Data Source* connection property and whose DBLocation property matches the *Location* connection property. This property defines what action the Data Model is to take if a matching DataSource object is not found.	Long
MR Init MDM Label Type	The current label type to be used for the connection.	String
MR Init MDM Language	The current language to be used for the connection.	String
MR Init MDM Version	The version of the MDM document to load. The value of this property can also be an expression that defines two or more versions to be combined as a superversion to load. For more information, see the topic Version Expressions on p. 29.	String

Property Name	**Description**	**Data Type**
MR Init MDM Version Variable	This property is used to specify whether the MDM version variable should be enabled. The MDM version variable is an autogenerated derived variable that is enabled using the IDocument.EnableMetadataVersionVariable property. The default value of False indicates that the version variable is not enabled and a value of True indicates that the version variable is enabled. The version variable is named *DataCollection.MetadataVersion*.	Boolean
MR Init MDSC	The MDSC to be used to load the metadata defined in the *Initial Catalog* setting. This property is ignored if *Initial Catalog* is not specified. For more information, see the topic DSCs Supplied with the IBM SPSS Data Collection Data Model on p. 38.	String
MR Init MDSC Access	Specifies the access mode for the MDM document being generated by the MDSC. A value of 0 specifies that the MDM document should be opened for read-only access. A value of 1 specifies that the MDM document should be opened for read/write access, and any changes will be written back to the MDSC when the connection is closed. A value of 2 specifies that the MDM document should be opened for read/write access, but any changes will *not* be written back to the MDSC. The default access mode is 2. When an MDSC is being used to generate the MDM document, the Data Model ignores the *MR Init MDM Access* setting.	Long
MR Init Native Schema	Specifies whether the native objects in the underlying database should be exposed directly as Data Model variables, without any interpretation. The default value of False indicates that the DSC should represent native database objects in a way that makes most sense in the Data Model. A value of True indicates that the DSC should expose native database objects without interpretation. For example, if a value of True is specified, a multiple dichotomy set in a *.sav* file would be represented as several long	Boolean

Property Name	Description	Data Type
	or text variables instead of one categorical variable.	
MR Init Output Locale	The locale ID to use when formatting output data, such as error or warning messages.	Long
MR Init Overwrite	Specifies whether the CDSC deletes the output data if it exists, before writing new data. The default value of 0 indicates that the CDSC should not overwrite existing data, but only append to the output data, if it exists. A value of 1 indicates that the CDSC should delete the output data and schema, which allows output data to be created with a different schema. A value of 2 indicates that the CDSC should delete any existing data records, but retain the native schema if possible. For some CDSCs, such as the Delimited Text DSC, the schema will be lost when the data is deleted, so the result will be the same for values of 1 and 2.	Long
MR Init Project	For CDSCs that support multiple projects, this property is used to specify the project to connect to.	String
MR Init Validation	Enables or disables any data validation performed during a write. The default value is True.	Boolean

DSCs Supplied with the IBM SPSS Data Collection Data Model

DSC	Description	Internal Name
ADO DSC	Reads case data and metadata from ADO files.	mrAdoDsc
Delimited Text DSC	Reads and writes tab-delimited, variable length, case data records to a text file.	mrCsvDsc
IBM SPSS Data Collection Data File CDSC	Reads and writes case data to a IBM® SPSS® Data Collection file-based database. The IBM SPSS Data Collection Data File CDSC has all the features of the Relational MR Database (RDB) CDSC, but does not require a separate relational database management system. IBM SPSS Data Collection Data Files therefore provide a simpler and more portable format for the storage of "offline"	mrDataFileDsc

DSC	Description	Internal Name
	IBM® SPSS® Data Collection Interviewer Server data.	
In2data DSC	Reads In2data case data and metadata.	mrI2dDsc
Log DSC	Reads standard Data Collection log files.	mrLogDsc
QDI/DRS DSC	Reads case data and metadata in the standard IBM® SPSS® Quancept™ QDI/DRS format.	mrQdiDrsDsc
IBM® SPSS® Quantum™ DSC	Reads and writes case data in a Quantum-format ASCII data file. Writes metadata in the form of a basic Quantum specification.	mrPunchDsc.
IBM® SPSS® Quanvert™ DSC	Reads metadata and case data in a Quanvert database.	mrQvDsc
Relational MR (RDB) Database CDSC	Reads and writes case data to a Data Collection relational database. The RDB DSC currently supports SQL Server databases only. This is the CDSC that Interviewer Server uses to write response data.	mrRdbDsc2
SPSS Statistics SAV DSC	Reads and writes metadata and case data in a IBM® SPSS® Statistics *.sav* file.	mrSavDsc
IBM® SPSS® Surveycraft™ DSC	Reads Surveycraft case data and metadata.	mrScDsc
Triple-S DSC	Reads and writes case data in a fixed-format or comma-separated text file that meets the version 1.2 or 2.0 Triple-S standard. Reads and writes metadata in a version 1.2 or 2.0 Triple-S XML file.	mrTripleSDsc
XML CDSC	Reads and writes case data to an XML file. Typically, you use this CDSC when you want to demonstrate or test the tabulation of small volumes of case data. To tabulate "offline" production data, use the IBM SPSS Data Collection Data File CDSC.	mrXmlDsc

For detailed information about these DSCs and how they interpret the underlying data, see the IBM® SPSS® Data Collection Developer Library (DDL) documentation.

Displaying Short Names for Variables that use Namespaces

If your variable names use namespaces, you may want to display the variables in IBM® SPSS® Data Collection Survey Tabulation without using the full namespace, to improve the table display. For example, if your variables have names such as *CompanyName.DivisionName.SurveyName.VariableName*, you may only want the *VariableName* part to be displayed in the tables you create.

You can restrict the number of levels from the full namespace that are displayed in Survey Tabulation by editing the project properties in IBM® SPSS® Data Collection Interviewer Server Administration. The changes you make apply to all of the variables in a project.

To Change the Number of Namespace Levels Displayed in Variable Names

- ▶ In Interviewer Server Administration, select the project and click the Edit Project Properties icon.

Figure 1-8
Edit Project Properties icon

- ▶ In the Edit Project window, click the Properties tab.
- ▶ In the Name field, choose <Click here to add property>.
- ▶ Enter LevelsShown as the name of the property.
- ▶ In the Value field, enter the number of levels from the namespace that you want to appear in Survey Tabulation. For example, type 1 to display only the final level from the namespace.

Note: For projects containing grid variables, enter a value of at least 2 to ensure that the full grid name is displayed.

- ▶ Click the Home button to return to the Interviewer Server Administration activities list.

Figure 1-9
Home button

Setting up a IBM SPSS Data Collection Interviewer project

This section describes how to set up a project for IBM® SPSS® Data Collection Interviewer. In order for a project to be considered a Interviewer project, it must have the IsMobile property set to True in the Distributed Property Management (DPM) system. If this property is not set, the project is not synchronized to remote devices.

Setting the IsMobile property:

- ▶ Select the project in the project list and click the Edit Project Properties button.
- ▶ On the Properties tab, scroll down to the bottom of the list of properties and click Click here to add property. A new property with placeholder values is added to the list.
- ▶ Select NewProperty and replace it with IsMobile.
- ▶ Select SomeValue and replace it with True.
- ▶ Select Boolean from the Type menu.

Modifying web service settings

You may also need to alter the default configuration of SyncWebService. If this service will run on a server that does not also host Web interviews, the web.config file should be modified so that the *ShouldHostTransferService* setting is set to True. Without this change, the case data sent to the server will not be merged into the database.

For more information, see “Modifying the Default Web Service Settings for IBM® SPSS® Data Collection Remote Administration” in the *IBM® SPSS® Data Collection Interviewer Server Installation Instructions and Configuration Notes*.

Custom project setup for IBM SPSS Data Collection Interviewer projects

IBM® SPSS® Data Collection Interviewer allows you to run a custom setup script when the user first downloads a project. To run a custom setup script, provide a file named *runonce.mrs* in the same directory as the project (*.mdd*) file. When the project is synchronized with a remote device for the first time, the synchronization process attempts to run the *runonce.mrs* file as an mrScript. The script is not run again unless it is changed on the server.

For more information on the synchronization process, see the Interviewer Architecture section in the IBM® SPSS® Data Collection Interviewer Server section of the IBM® SPSS® Data Collection Developer Library.

Deleting projects

Deleting a project removes it from IBM® SPSS® Data Collection Interviewer Server Administration and Interviewer Server Administration’s distributed property management system (DPM). You can also delete the project’s files and its case data, sample management and quota databases.

Note: The Firefox browser does not support project deletion. Contact your IBM® SPSS® Data Collection administrator to find out how to do this.

If the project uses sample management, the sample management object is also deleted. If you have projects that share sample management objects, you should ask your Interviewer Server Administration administrator to change this behavior so that deleting a project does not delete the sample management object.

It is recommended that projects to be deleted are in the Inactive state. If you try to delete a project that is not in this state, the deletion procedure will ask whether you want to change the project’s state before deleting it.

When you activate a project, the activation process creates a project folder in the Projects subfolder of the IBM® SPSS® Data Collection Interviewer Server installation folder, and places a copy of the project’s *.mdd* file in this folder. This folder exists on every machine running the interviewing server and is updated automatically by the activation process.
For example, if you activate the tea project every interviewing server will contain the file [INSTALL_FOLDER]\IBM\SPSS\DataCollection\6\Interviewer Server\Projects\tea\tea.mdd.

These folders and files are not deleted when you delete a project in Interviewer Server Administration, but you may delete them manually afterwards.

If your company uses a hierarchical project list, deleting the last project from a folder automatically deletes the folder too. If you delete the last project and the folder is not deleted, this is because the folder contains other projects that are invisible to you because you do not have permission to use them.

Deleting a project

▶ Select the project in the Interviewer Server Administration project list.

▶ Click the Delete icon.

▶ If the project is not Inactive, Interviewer Server Administration displays a reminder that this is recommended and asks whether you want to change the project's status now. Click Yes to change the status and then delete the project, No to leave the project's state as it is and then delete the project, or Cancel to cancel the deletion request.

▶ Next, you are asked whether you want to delete the case data and other files associated with the project. The default is to delete the project from Interviewer Server Administration and DPM but not to delete any files. To delete the case data, sample management, and quota files, select Delete will remove existing files and the case data database. If you do not want to delete sample management or quota files, cancel the check boxes that this option has selected for you. Click Continue. If you have any doubts about deleting the project, click Cancel as this is your last opportunity to cancel the deletion request.

Note: Project names are unique to each customer account. After deleting a project, other users will not be able to create a new project, with the same name as the deleted project, unless they are assigned to the same customer account in which the deleted project was created.

Interviewer Server Administration processes your deletion request and displays a message box when the project has been deleted.

▶ Click Close to close the message box.

Locking and unlocking projects

IBM® SPSS® Data Collection Interviewer Server Administration automatically locks a project when you use an activity that can change the project files. When a project is locked, everyone except the person who locked the project has restricted access to the project, and most activities will be unavailable to them. This is an important safety mechanism designed to prevent one user accidentally overwriting another user's files.

Interviewer Server Administration does not automatically unlock a project when you close the activity that locked it. If you are working on a project that is shared with other users, you should unlock the project when you have finished working on it. Unlocking the project makes it fully available to other users. If you have changed any of the project files, you should use the Files activity to check them in to the shared area so that your changes are visible to other users. Normally you should do this before you unlock the project.

Note that using IBM® SPSS® Data Collection Survey Tabulation does not lock a project, because Survey Tabulation never writes data to the main project files. (When you create new variables in Survey Tabulation, they are stored separately from the main project data.) This means that you can use Survey Tabulation on a project that is locked.

Locking a project:

- ▶ Select the project in the project list.
- ▶ Click the Lock Project icon.

Unlocking a project:

- ▶ Select the project in the Interviewer Server Administration project list.
- ▶ Click the Unlock Project icon.

Unlocking other people's projects

Some users (usually managers) have permission to unlock other people's projects. If you unlock a project that is locked by another user, any project files in the shared folder become available to other users. Files that the user has in his/her user folder remain there and do not become available to other users. If these files have been changed more recently than the files in the shared folder then there is the possibility that whoever works on the project next will be using out of date files.

Here is a very simple example that clearly illustrates why project locking is so important and why you should not unlock other users' projects unless it is really necessary.

- Ben creates a new project and uses Build to build the questionnaire. IBM® SPSS® Data Collection Interviewer Server Administration locks the project as soon as Ben uses Build. Ben knows that it will take a few days to complete the questionnaire so he decides to check his files in at the end of each day but to leave the project locked until he has completed the questionnaire.
- Michael unlocks Ben's project and opens it in Build. He makes some changes to the questionnaire, checks in the files, and unlocks the project.
- Ben does not know that Michael worked on the project, and continues building the questionnaire using the files in his User folder. He checks his files in at the end of the second day. Ben's files overwrite the files that Michael checked in and all Michael's changes are lost.

This situation could have been avoided if Michael had told Ben that he wanted to work on the project. Ideally, he should have asked Ben to unlock the project. If Ben was not available to do this, Michael should either have left the project locked, or he should have told Ben that he had worked on the project. In either case, Ben would then have known to check out the latest files from the shared folder before adding new questions to the questionnaire.

Logging in as a different user

If you are logged in to IBM® SPSS® Data Collection Interviewer Server Administration under one user name and you need to do some work using a different user name, there is no need to close your existing session. Instead, you can return to the login page and enter a different user name

and password. This is a handy time-saver for administrators who also have another Interviewer Server Administration account for non-administration work.

Logging in as a different user

- Click the Logout icon in the Interviewer Server Administration menu bar.
- On the Login page, enter a user name and password and click Login.

Concurrent Usage report

The Concurrent Usage report provides information on the number of users who have used the various IBM® SPSS® Data Collection Interviewer Server Administration activities during a particular time period.

Viewing the Concurrent Usage report

From the Interviewer Server Administration menus, select:
Reports > Concurrent Usage Report

The report provides statistics based on hourly, daily, and monthly activity usage.

Note: You must be assigned to the *Concurrent Usage Report* activity in order to view the report. When assigned to the CustomerAccountAdmins role, you have unlimited access to all users, roles, projects, activities, and activity features (including concurrent usage reports) for your defined customer account(s). For more information, see the topic User Administration on p. 56.

Creating a Concurrent Usage report

- Select one or more activities in the activity list.
- In Customer Account, select the account you want to view, or select All to view the report across all accounts.
- In Units of time, select Hourly, Daily, or Monthly.
- In the Starting on and Ending on fields, select the time period that the report will cover.

  Note: The selected time is UTC time.
- Click Apply to generate the report. The report displays on the right-side of the screen.

Web Explorer

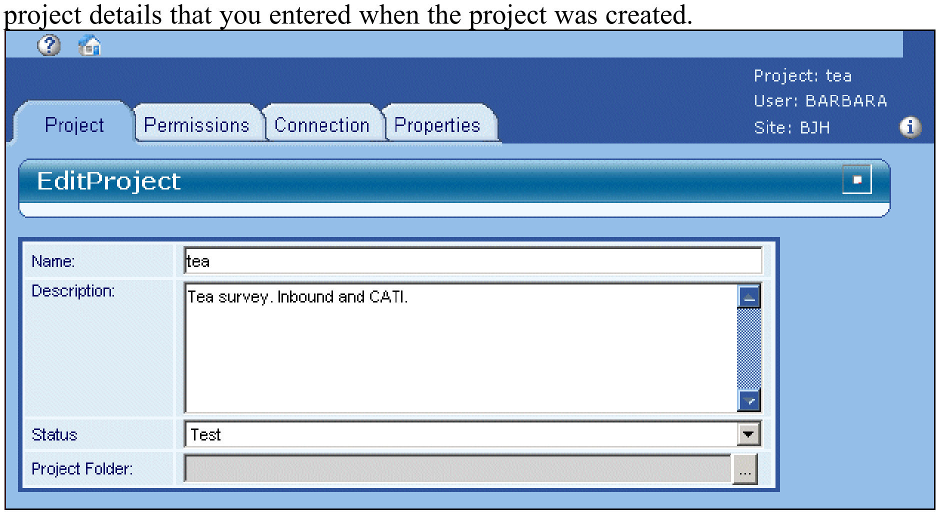
Use the Web Explorer to manage files within your projects. Depending on the menu option that you use to access the Web Explorer, it appears as an Open or Save dialog box. The Web Explorer gives you access to files in your user folder for the currently open project. You can use the Web Explorer to open and save table document (*.mtd*) files, and to manage files by renaming them, moving them, and organizing them into folders.

If you have the appropriate access permissions, you can also access files in the shared folder, so that, for example, you can save files for use by colleagues or open files created by colleagues.

Edit Project

IBM® SPSS® Data Collection Interviewer Server Administration stores properties for each project. The properties are stored in the Distributed Property Management (DPM) system. Project properties store information that is needed by Interviewer Server Administration and other activities. For example, the *UseSampleManagement* property specifies whether an IBM® SPSS® Data Collection Interviewer Server project uses Sample Management, while the *ProjectInactivePage* property specifies the URL or template to display when a user tries to run an interview on an inactive project.

You use Edit Project to add, delete or change project properties, and also to change the basic project details that you entered when the project was created.



Edit Project has the following tabs:

Project. Lets you change the project's name, description, status and project folder.

Permissions. Lets you check which roles have access to the project and remove any which should not have access.

Connection. Lets you change the project's connection properties. Generally, you should not change the connection properties for Interviewer Server projects. For IBM® SPSS® Data Collection Survey Tabulation projects, you might want to change the connection properties during the initial stages of setting up the project, but should not normally do so afterwards. For more information, see the topic Changing Connection Properties on p. 47.

Properties. Lets you inspect and, if necessary, change the project's properties. For more information, see the topic Working with Project Properties on p. 49.

When you have finished using Edit Project, click the Home icon in the menu bar.

Starting Edit Project

- Select a project in the project list.
- Click the Edit Project icon in the toolbar at the top of the project list.

Changing Project Details

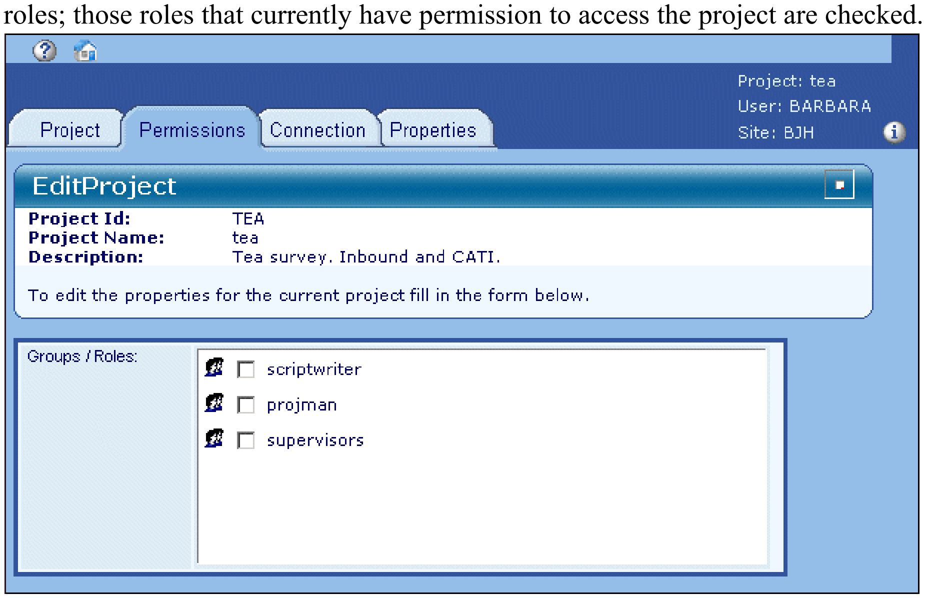
You can change a project's name, description or status. You cannot change the project ID because this is used in the names of files associated with the project.

If you change the project's name, any files created for the project after that point will still be created using the project ID. For example, suppose you created a new project called holidays whose project ID was also holidays. Files belonging to this project will have 'holidays' in their names. If you change the project name to skihols, it will appear as skihols throughout IBM® SPSS® Data Collection Interviewer Server Administration but the files will still be referred to as 'holidays'.

- Select the Project tab and make your changes.

Changing Permissions

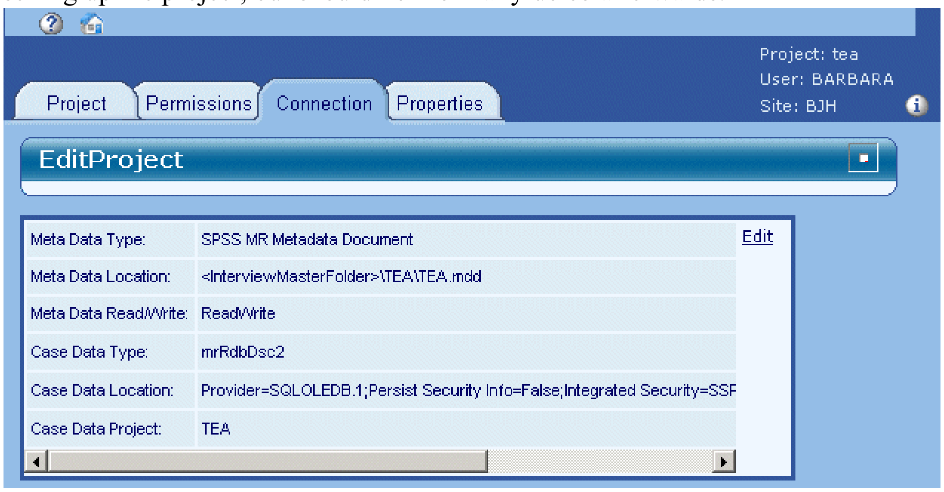
You can change the roles that have permission to access the project. The Permissions tab lists all roles; those roles that currently have permission to access the project are checked.



- On the Permissions tab, select the roles that are to have access to the project and deselect any whose access is to be removed.

Changing Connection Properties

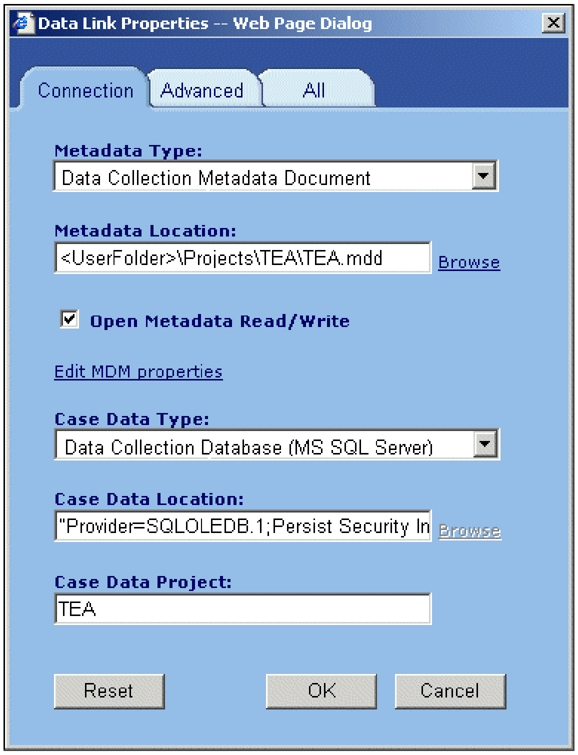
You can use the Connection tab in Edit Project to view and, if necessary, change the project's connection properties. Generally, you should not change the connection properties for an IBM® SPSS® Data Collection Interviewer Server project. For an IBM® SPSS® Data Collection Survey Tabulation project, you might want to change the connection properties during the initial stages of setting up the project, but should not normally do so afterwards.



To Change the Connection Properties:

- ▶ Select the Connection tab.
- ▶ In the top right corner, click Edit.

This opens the Connection tab in the Data Link Properties dialog box. For more information, see the topic Data Link Properties Dialog Box: Connection Tab on p. 23.



- From the Metadata Type drop-down list, select the type of metadata you want to use for the project.

- Enter the Metadata Location by clicking Browse and selecting the metadata file in the Select dialog box. (If you cannot see the file you want to use, you may need to upload it first. You can do this using the Upload button in the top left corner.)

- If you are using an *.mdd* file and want to change the default language or user context, click Edit MDM Properties and then select the required options. For more information, see the topic Data Link Properties: MDM Properties on p. 27.

  Note that the MDM Properties dialog box enables you to select the version or versions to use. However, if there is more than one version, Survey Tabulation always uses a combination of all of the available versions (this is sometimes called the **superversion**), regardless what you select in this dialog box.

- From the Case Data Type drop-down list, select the type of case data you are using for the project. If the case data is stored in a relational MR (RDB) database, make sure you select SPSS MR Relational MR database 2.

- Enter the Case Data Location. How you enter the location depends on the case data type. When the case data format is file based, you can click Browse and then select the file in the Select dialog box. If necessary, use the Upload button to upload the files. If the case data is stored in a relational MR database, see Connecting to a Relational MR Database Using RDB DSC 2 for more information.

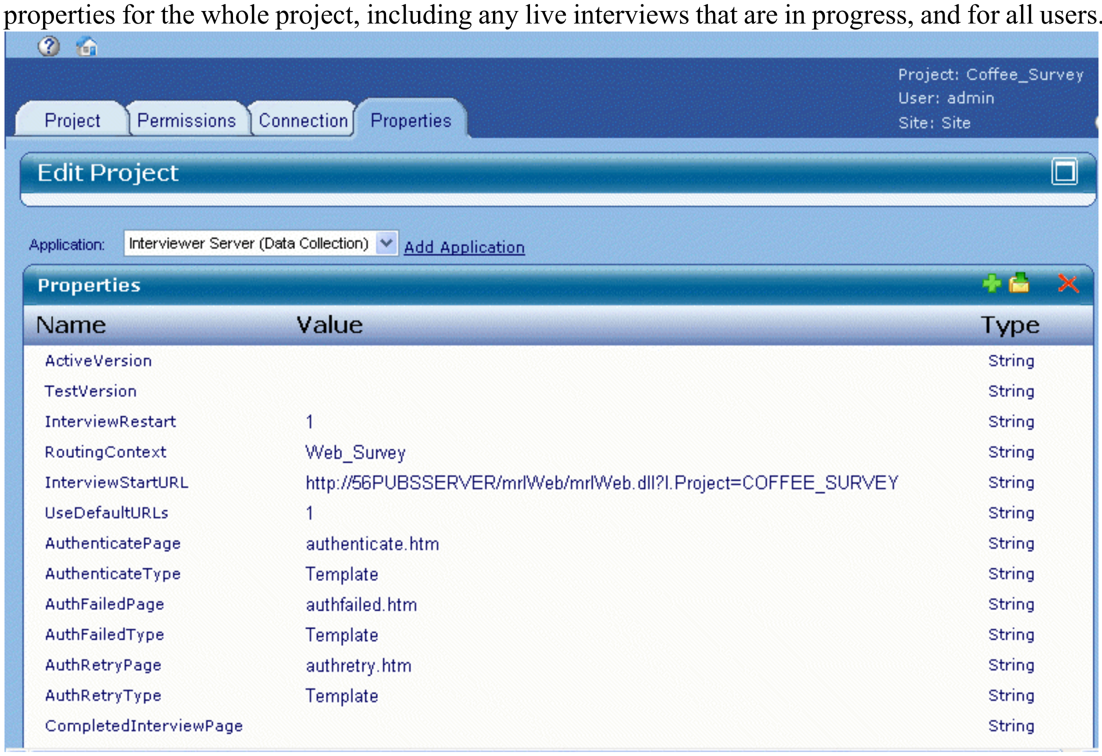
- If the case data is stored in a relational MR database, enter the Case Data Project. For all other case data types, clear this text box.

► Click OK.

Working with Project Properties

IBM® SPSS® Data Collection Interviewer Server Administration stores properties for each project in the Distributed Property Management (DPM) system. Project properties store information that is needed by Interviewer Server Administration and other activities. For example, the *UseSampleManagement* property specifies whether an IBM® SPSS® Data Collection Interviewer Server project uses Sample Management, while the *ProjectInactivePage* property specifies the URL or template to display when a user tries to run an interview on an inactive project.

You use the Properties tab in Edit Project to view and, if necessary, add, change, and delete project properties. However, note that changing the project properties in this way will change the properties for the whole project, including any live interviews that are in progress, and for all users.



Adding Project Properties

When you create a project in IBM® SPSS® Data Collection Interviewer Server Administration and you specify the application type, this places the appropriate set of default properties in DPM for that project. If you want to use a project for both data gathering and analysis you must add a second application type and then specify the necessary properties for that application type.

You can also add other properties of your choice, for example, if you have added your own properties to DPM to store customized information about a project. This is how you set up the QuotaAutoCommit facility for projects that use Quota Control with Sample Management. This causes the counts of completed and rolled back interviews to be incremented at the end of an interview and the corresponding pending counts to be decremented, as happens automatically in projects that use Quota Control but not Sample Management. For further information about quota control refer to 'How the Quota System Works' in *IBM® SPSS® Data Collection Interviewer Server User's Guide*.

To Add an Application Type to a Project:

- Click Add Application at the top of the properties list. This opens the Select Application dialog box.
- Choose an application type from the list and click OK.

The application type is added to the project and its property list is displayed at the foot of the page.

To Add a Project Property:

- On the Properties tab, in Project Type, choose the project type to which you want to add properties.
- Click the Add icon at the top of the properties list, or click Click here to add property at the foot of the list.

  A new line is added to the end of the list.
- In this new line, click NewProperty and type the name of the property you want to add.
- Click Some Value and type the value that the new property is to have.
- In the Type column, set the data type for the new property.

Deleting Project Properties

- On the Properties tab, select the property and click the Delete icon at the top of the properties list.

Changing Project Properties

You can change the value of a project property at any time, but not its name or type. To change property names or types you must delete the existing property and then create a new property with the required name and/or data type.

For information about the function of individual properties, see Project Properties.

To Change the Value of a Project Property:

- On the Properties tab, click the property value you want to change and type the new value.

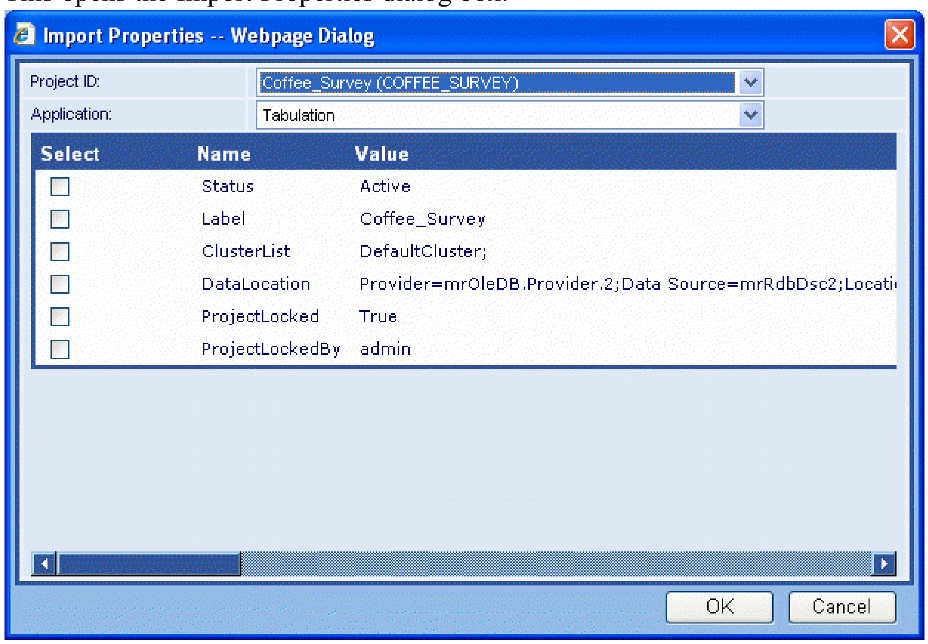
Note: If a property name is displayed in light blue, the property is a read-only property and cannot be changed.

Importing Properties from Another Project

If you have added properties to one project that you want to add to other projects, you can save yourself time and reduce the likelihood of errors by importing the new properties from one project into another.

▶ On the Properties tab, click the Import icon at the top of the properties list.

This opens the Import Properties dialog box.



▶ In Project ID, choose the project from which to import properties.

▶ In Application, choose the application type to which the properties belong.

▶ In the list of properties, select the properties to be imported.

▶ Click OK.

Project Properties

IBM® SPSS® Data Collection Interviewer Server Project Properties

The following table lists the project properties that apply to Interviewer Server. The following properties are listed as Standard application properties: ClusterList, ProjectLocked, ProjectLockedBy, InterviewScriptType, ShowInterviewApps, ShowTableApps. All others are listed as Interviewer Server properties. For further information about these properties refer to

"Project and Interview Properties" in the Interview Scripting Reference section of the IBM® SPSS® Data Collection Developer Library.

Property	**Description**
ActiveVersion	The active metadata version to use for interviewing. If not specified, the latest version is used. Exists for IBM® SPSS® Data Collection projects only.
AppointmentCode	The call outcome code that prompts CATI interviewers to arrange an appointment with the respondent. Set when a project is activated with CATI. By default this corresponds to the APPOINTMENT call outcome. Set when a project is activated with CATI.
AuthenticatePage	The page to be used for authentication. This can be in the form of a URL or the name of a template (for example, *http://www.abc.com/interview/urls/auth.html* or *authtemplate.htm*). However, it is recommended that you use a template and *not* a URL for this page.
AuthenticateType	The form of the `AuthenticatePage` property; valid states are URL or TEMPLATE.
AuthFailedPage	The page to be shown when authentication fails. This can be in the form of a URL or the name of a template.
AuthFailedType	The form of the `AuthFailedPage` property; valid states are URL or TEMPLATE.
AuthRetryPage	The page to be used when a respondent accesses authentication for the second and subsequent times. This can be in the form of a URL or the name of a template—for example, *http://www.abc.com/interview/urls/auth.html* or *authtemplate.htm*. However, it is recommended that you use a template and *not* a URL for this page.
AuthRetryType	The form of the `AuthRetryPage` property; valid states are URL or TEMPLATE.
AutoDialTimeout	The number of seconds that auto-dialing should continue trying to dial numbers for an Interviewer. The default is 600 seconds (10 minutes).
AutoUpdateDataModel	Whether data is written immediately to the data model. 0=do not write immediately, 1=write to the data model for each submitted page (the default), 2=write to the data model immediately for each value. For further information refer to "The Value Cache" in the Data Collection Developer Library.
CallerID	The phone number to send as the caller's identification when calls are made using an autodialer. If set to 0, no caller ID is sent. If set to 1, the dialer's phone number is sent. Otherwise the contents of this field are sent as the ID.
CancelCode	The call outcome code that can be used to terminate a CATI interview when the respondent no longer wishes to continue. By default, this corresponds to the ABANDONED call outcome. Set when a project is activated with CATI.

Property	**Description**
ClusterList	Names the cluster on which the project is activated. Currently, all projects are activated to the same cluster which is called DefaultCluster.
CompletedInterviewPage	The page to be shown at the end of a completed interview. This can be in the form of a URL or the name of a template.
CompletedInterviewType	The form of the `CompletedInterviewPage` property; valid states are URL or TEMPLATE.
ConfirmHangupOutcomes	A semicolon separated list that includes all call outcomes that do not immediately disconnect the call. This property is only employed when used with IBM® SPSS® Data Collection Dialer. Interviewers will need to exit and re-enter the Phone participants activity in order to pick up changes to this property. By default, this corresponds to the TransferToWeb call outcome.
DefaultCategoryType	In the Build activity, the response type for categorical responses if none is selected.
DefaultPresentationTemplate	In the Build activity, the name of the presentation template file to use when a question has no other template defined.
DialingProvider	The name of the dialing sample management provider to use, specified as the ProgID of the provider class. Existing names are QsampExtSM.Provider and QSampGroupSM.Provider. The property is empty when the project does not use a dialer.
ExpiryDateTime	Specifies a project expiry time that controls the last time that an interview can occur for a project in web or phone mode including prohibiting appointments to be set after the expiry time.
HiddenCodesList	Call outcome codes that should not be displayed in the list that interviewers see. This list contains codes, such as COMPLETED, that are normally assigned by the interviewing program itself or by the project's sample management script. Supervisors can view and change this list using the Phone Surveys activity; Data Collection administrators can view and change it using DPM Explorer.
InterviewRejectedPage	The page to be shown when authentication fails and no retries are to be offered. This can be in the form of a URL or the name of a template.
InterviewRejectedType	The form of the `InterviewRejectedPage` property; valid states are URL or TEMPLATE.
InterviewRestart	Whether an interview should be restarted using the version it started on, or the active version. 0=Restart on initial version, 1=Restart on active version. The default is 0. Exists for Data Collection projects only.
InterviewScriptType	The script type. Always Data Collection.
InterviewStartURL	The URL used to start an interview on the project.
InterviewStoppedPage	The page to be shown when a respondent selects the Stop button during an interview. This can be in the form of a URL or the name of a template.

Property	Description
InterviewStoppedType	The form of the `InterviewStoppedPage` property; valid states are URL or TEMPLATE.
LastActivatedBy	The name of the user who last activated the project. Exists for Data Collection projects only, and is set during activation. Not available for importing.
MaxAuthRetries	The maximum number of times a respondent may retry authentication after failing the initial attempt. The default is 5.
MonitoringAllowed	Whether interviewers may be monitored. Possible settings are: 0=Never allowed; 1=Always allowed; 2=Ask participant. The default is 2.
Interviewer Server	Properties associated with Interviewer Server itself.
NoAnswerTimeout	The number of seconds for the dialer to let a number ring before it is considered to be unanswered. The default is 15 seconds.
Notes	Notes about the project. Used, for example, to explain the differences between different versions of the project.
PercentCallsRecorded	The percentage of calls to be recorded per project between 0 and 100. The default is 0.
ProjectInactivePage	The page to be shown when a respondent attempts to access a project that is not available for interviewing. This can be in the form of a URL or the name of a template.
ProjectInactiveType	The form of the `ProjectInactivePage` property; valid states are URL or TEMPLATE.
ProjectLocked	Whether the project is locked. 0=No, 1=Yes. When a project is locked by one user, some activities that would normally by available to other users of the project will no longer be available. Not available for importing.
ProjectLockedBy	The name of the user who has locked the project. Not available for importing.
QuotaFullPage	The page to be shown when an interview terminates because the quota is full. This can be in the form of a URL or the name of a template.
QuotaFullType	The form of the `QuotaFullPage` property; valid states are URL or TEMPLATE.
QuotaProjectName	The name of the quota project associated with this project. Blank if quota is not used.
RaisePositionError	Whether to prevent interviewers logging in on positions that are not defined in the dialer configuration file. If this property is False, interviewers logging in on positions not in the dialer configuration file see a warning but may continue to work.
RoutingContext	The default routing context for the project. Set when a project is activated. Typical routing contexts are Paper for printed questionnaires, Web for inbound interviews, and CATI for outbound calling.

Property	Description
RunningCodesList	Call outcome codes that are available during interviews. Defaults to the codes that represent ABANDONED, APPOINTMENT, and TRANSFERTOWEB.
RunningCodesList	Call outcome codes that are available while interviews are running. Created when a project is activated with CATI.
SampleManagementProvider	The name of the sample management provider to use; for example, VBScriptSM.Provider. Used for Data Collection projects only.
ShowInterviewApps	Whether to display interviewing activities in the activities list. 0=No, 1=Yes. The default is 1 for questionnaire projects.
ShowTableApps	Whether to display tabulation activities in the activities list. 0=No, 1=Yes. The default is for 0 questionnaire projects.
SilentCallAudioFile	The name of a *.wav* file to play to a participant if predictive dialing results in a silent call.
TestUseQuota	Whether to use quota control for test interviews. 0=No, 1=Yes. The default is 1.
TestUseSampleMgmt	Whether to use sample management in test interviews. 0=No, 1=Yes. The default is 1.
TestVersion	The metadata version to use for test interviews. If not specified, the latest version is used. Exists for Data Collection projects only.
TimeLastActivated	The date and time at which the project was last activated. Set when a project is activated. Not available for importing.
UseCATI	Whether the project has been activated for CATI. 0=No, 1=Yes. The default is 0. Not available for importing.
UseDataModel	Whether the project uses the Data Collection Data Model. 0=No, 1=Yes. The default is 1. *Note:* This property is obsolete in Interviewer Server 2.1 and later.
UseDefaultURLs	Whether the project uses the default templates and URLs. 0=No, 1=Yes.
UseImageCache	Whether or not to use the image cache for project templates and images. 0=No, 1=Yes. The default is 1.
UseInMemoryCache	Whether the data cache should be held in memory only. There is no automatic restart on fail-over when the in-memory cache is used. 0=No, 1=Yes. The default is 0.
UsePlayerNavigation	Indicates whether the player can post previous questions. For example, in the case of a browser, the browser Back button can be used to return to a previous page of the interview. 0=No, 1=Yes. The default is 1.
UseSampleMgmt	Whether the project uses Sample Management. 0=No, 1=Yes.

IBM® SPSS® Data Collection Survey Tabulation Project Properties

The following table lists the project properties that apply only to Survey Tabulation.

Property	Description
CurrentTablesFilename	The user's current tables document (*.mtd*) file.
DataLocation	The project's connection string.
LevelsShown	Specifies the number of levels of a variable name to display in Survey Tabulation. Use this property to limit the length of variable names when your variables use namespaces; for example, select 1 to display only the final level from the namespace. For projects containing grid variables, enter a value of at least 2 to ensure that the full grid name is displayed.
MetadataScript	Stores an XML document that contains details of any new variables and modifications to existing variables made by the user in Survey Tabulation.

User Administration

You use User Administration to set up and maintain customer accounts for IBM® SPSS® Data Collection Interviewer Server Administration users, to set up and maintain user groups (known as **roles** in Interviewer Server Administration), and to specify access rights to projects, case data, and activity features for different customer accounts, users, and roles.

All information about projects, activity features, and access rights is stored as properties in the Distributed Property Management system (DPM). User Administration displays this information using a tree structure similar to that of Windows Explorer and provides a flexible method of changing and adding information.

Notes

- If you want to use User Administration, you must be authorized in Interviewer Server Administration to use the activity. For further details, open the *IBM® SPSS® Data Collection Developer Library* documentation and search for the topic entitled "Who Can Run User Administration."
- DPM can support up to 5000 users before any noticeable loss in performance.

When Interviewer Server Administration is installed, the following special roles are created:

- **Analyst** This role is for IBM® SPSS® Data Collection Author users and allows analysts to define the way each question should be reported (change the analysis context) but not add or remove questions. The role provides access to the following Author activity features:

  – *Can save edited questionnaire file to server*
  – *Can edit labels*
  – *Can edit base language*
  – *Can manage context*
  – *Can edit Analysis context*
  – *Can view routing*
  – *Can view question properties*
  – *Can view advanced properties*
  – *Can view custom properties*

– *Can edit translator notes*
– *Can run Auto Answer*
– *Files*

- **CATIinterviewer** This role is for CATI Interviewers and is set up to give access only to Interviewer Server Administration (excluding the "Allow unlock project" feature) and the Phone Participants activity (excluding the "Can set up interviewer stations" feature). *You must make your interviewers members of this role if you want IBM® SPSS® Data Collection Interviewer Server to take interviewer qualifications into account when assigning calls to interviewers*.

  Note: In order to use the Appointment tab options in the Phone Survey activity, you must first assign one time zone and one appointment schedule to at least one applicable user.

- **CATIsupervisor** This role is for CATI supervisors and is set up to provide access to the following activities:

  – *Interviewer Server Administration* (excluding the "Allow unlock project" feature)
  – *Interviewer Monitoring* (including the "Can set up supervisor stations" feature)
  – *Dialer Administration*
  – *View Survey Link*
  – *Launch* (excluding the "Allow upload/edit sample script" and "Allow access via Interviewer Server Administration" features)
  – *Participants* (including all features except "Can create databases" and "Can delete participants" [1])
  – *Email*
  – *Phone Surveys* (including all features except "Can edit fields", "Can edit call outcomes", and "Can delete call outcomes")
  – *Quotas* (including only the "Allow editing quota targets, completes, and prioritization" and "Allow editing quota targets" features)
  – *Phone Participants* (including the "Can set up interviewer stations" feature)
  – *Export Data*
  – *Survey Results*
  – *Status*
  – *Phone* (including only the "Can view all interviewers' data" feature)

- **CustomerAccountAdmins** This is an administration role for administering customer accounts. Anyone who is part of this group has unlimited access to all users, roles, projects, activities, and activity features for their defined customer account(s).

- **DPMAdmins** This is an administration role and the user named as the DPM administrator during installation is made a member of this group. Anyone who is part of this group has unlimited access to all projects, activities, and activity features.

- **ProjectManager** This role is for Author users and allows project managers to run surveys at any time. Project managers cannot add or change any survey element. The role provides access to the following Author activity features:

  – *Can activate in test mode*
  – *Can view advanced activation settings*
  – *Can view routing*
  – *Can view question properties*

– Can view advanced properties
– Can view custom properties
– Can run Auto Answer
– Files
– Export Data activity feature - Can alter data link connection properties

- **SampleManager** This role is for Author users and allows sample managers to create and upload samples to Interviewer Server Administration. The role provides access to the following Author activity features:

  – Can activate in test mode
  – Can activate in go-live mode
  – Can edit advanced activation settings
  – Can view advanced activation settings
  – Can upload participants
  – Allow user download accessories

- **SurveyCreator** This role is for Author users and allows survey creators to create surveys using a combination of library items and new questions. Library items can be added to the survey but cannot be changed. Survey creators can create and change new items, but they cannot write scripts. The role provides access to the following Author activity features:

  – Can save questionnaire file to local directory
  – Can save edited questionnaire file to server
  – Can edit labels
  – Can edit base language
  – Can manage language
  – Can edit Question context
  – Can edit Analysis context
  – Can view routing
  – Can edit routing structure
  – Can edit routing item
  – Can insert routing item
  – Can delete routing item
  – Can insert a new routing
  – Can delete routing
  – Can edit a question structure
  – Can insert a question
  – Can delete a question
  – Can edit a shared list
  – Can insert a shared list
  – Can delete a shared list
  – Can view question properties
  – Can edit question properties
  – Can view advanced properties
  – Can edit advanced properties
  – Can edit translator notes
  – Can set up connection to repository
  – Can insert from library

– Can activate in test mode
– Can run Auto Answer
– Can apply project templates
– Allow user download accessories
– Files

- **SurveyCreatorAdvanced** This role is for Author users and allows survey creators to enhance surveys by changing standard questions, adding new questions, and writing scripts. The role provides access to all Author activity features, as well as the Export Data activity feature *– Can alter data link connection properties*.
- **SurveyLauncher** This role is for Author users and allows these users to activate surveys. The role provides access to the following Author activity features:

  – Can activate in test mode
  – Can activate in go-live mode
  – Can view advanced activation settings
  – Can edit advanced activation settings
  – Can upload participants
- **SurveyReviewer** The role is for Author users and allows these users to view routings and properties in Author in read-only mode. Users cannot edit, save, or activate. This role can utilized by upper-level managers, customers, and so on. The role provides access to the following Author activity features:

  – Can view routing
  – Can view question properties
  – Can view advanced properties
  – Can view custom properties
- **TabulationFullAccess** This role is for users who require access to all of the IBM® SPSS® Data Collection Survey Tabulation and IBM® SPSS® Data Collection Survey Reporter functionality. Access is provided to the following activities:

  – Interviewer Server Administration (including the "Allow unlock project" feature)
  – Project Editor (including the "Allow modifying properties", "Allow creating new projects", and "Allow changing the project state" features)
  – Export Data (including the "Can view advanced properties" feature)
  – Files
  – Delete (including the "Allow delete project" feature)
  – Survey Tabulation (including the "Full access" feature)
  – Survey Reporter
- **TabulationMediumAccess** This role is for Survey Tabulation users and Survey Reporter users who need to set up their own projects and tables and edit variables on individual tables, but who do not need to edit variables at project level. Access is provided to the same activities as for the TabulationFullAccess role, except that the Survey Tabulation activity and Survey Reporter activity includes the "Medium access" feature instead of the "Full access" feature.
- **TabulationMinimumAccess** This role is for Survey Tabulation users and Survey Reporter users who do not need to set up their own projects or tables, or edit variables. Access is provided to the following activities:
  – Interviewer Server Administration (excluding the "Allow unlock project" feature)

– Survey Tabulation (including the "Minimum access" feature)
– Survey Reporter

- **Translator** This role is for Author users and allows translators to add translations to existing questions. Translators cannot add questions or remove questions. The role provides access to the following activity features:

  – *Can save edited questionnaire file to server*
  – *Can edit labels*
  – *Can edit Question context*
  – *Can edit Analysis context*
  – *Can edit translator notes*
  – *Allow user download accessories*
  – *Files*

User properties

User properties define any special abilities or qualifications that a user has in relation to the requirements of one or more activities. One of the most common uses of user properties is for interviewer qualifications which help to determine which records are allocated to each interviewer for calling. For example, if a participant record indicates that the participant's usual language is French, the project's Sample Management script can ensure that the record is allocated to a French-speaking interviewer.

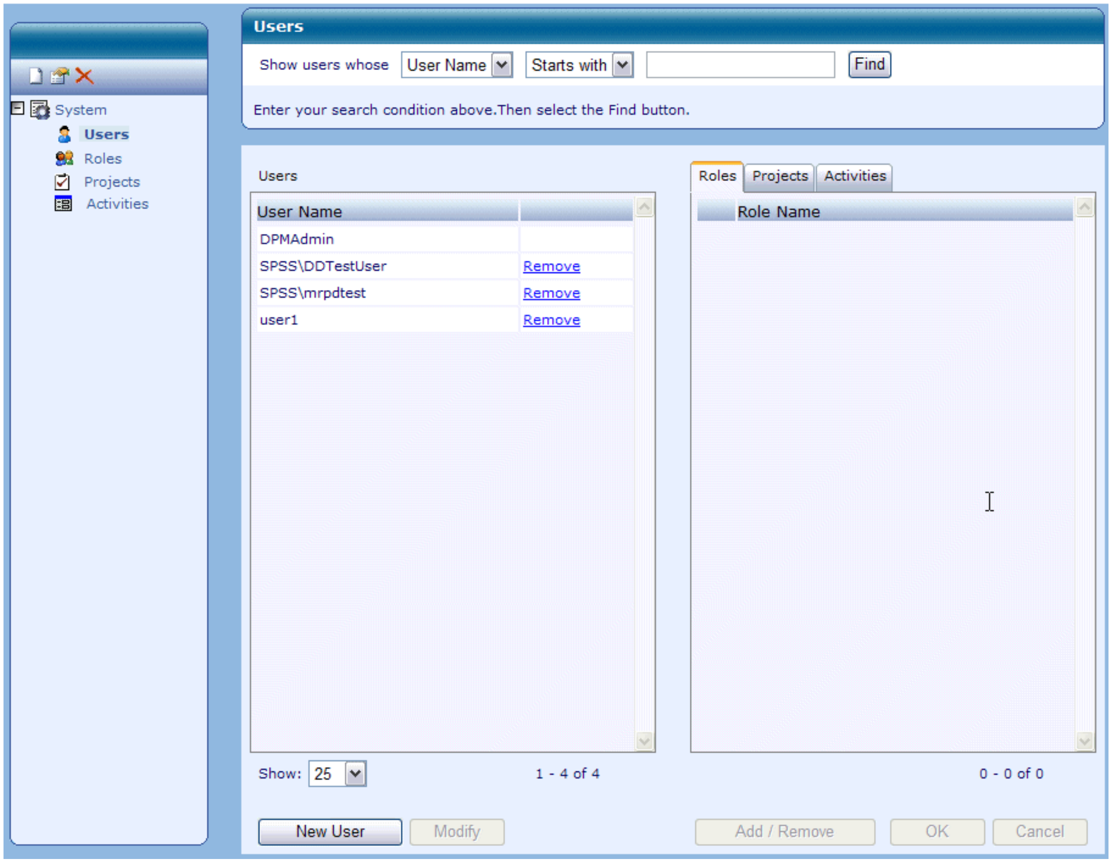
User properties are defined as part of property groups, each of which is associated with a specific role. Only members of the role may have user properties assigned to them from groups associated with that role. Currently, interviewer qualifications are the only user properties that the standard IBM® SPSS® Data Collection activities recognize. To use them, you must create a property group called InterviewerQualifications and associate it with the CATIinterviewer role. You can then assign interviewer qualifications to all members of the CATIinterviewer role. If your company has added its own activities, and these activities recognize user qualifications, you may create other types of properties for use with those activities.

There are three stages to setting up user properties, some of which you will do more than others:

- Create a property group (for example, InterviewerQualifications)
- Add properties to the property group (for example, Language spoken, Refusal converter)
- Assign properties to users. (For existing users, simply modify the user's account and click the User Properties button to assign the properties; when creating new users, you will be prompted to assign properties as part of the user-creation process.)

You can also change the definitions of properties within a group, delete properties from a group, and delete property groups.

Although it is browser based, User Administration works in a similar way to Windows Explorer. It displays an expandable tree-like structure on the left of the page for viewing current user and group details, and uses the right-hand side of the page for displaying more detailed information and links for possible actions.



When you have finished using User Administration, click the Home icon in the menu bar.

Note: If you want to use User Administration, you must be authorized in Interviewer Server Administration to use it and must be a member of the role named in the HKEY_LOCAL_MACHINE\SOFTWARE\SPSS\MRUserManagement\UserMgtAdministratorRole registry key (which is the DPMAdmins role by default). For further details open the *Data Collection Developer Library* documentation and search for the topic entitled "Who Can Run User Administration".

[1] Deleting participants from telephone interviewing projects can cause phone reports to show unexpected results. If a user or role is assigned to telephone interviewing projects, do not assign that user or role to the "Can Delete Participants" feature.

Starting User Administration

► From the IBM® SPSS® Data Collection Interviewer Server Administration menu, choose
Tools > User Administration

Note: If you want to use User Administration, you must be authorized in Interviewer Server Administration to use it and must be a member of the role named in the HKEY_LOCAL_MACHINE\SOFTWARE\SPSS\MRUserManagement\UserMgtAdministratorRole registry key (which is the DPMAdmins role by default). For further details open the *IBM®*

SPSS® Data Collection Developer Library documentation and search for the topic entitled “Who Can Run User Administration”.

Adding customer accounts

IBM® SPSS® Data Collection administrators can create individual accounts for each customer. These customer accounts effectively group users, roles, project and project activities and allow administrators to:

- Group user, role and activity user projects and system projects by customer accounts.
- Manage users in hierarchy structure.
- Provide tailored branding options for Data Collection products by customer account. Branding information, such as company logos, default page pictures, home page site links and *CSS* files can be set for each customer by users who are assigned the *CanEditCustomerAccount* activity feature. System account users can modify branding information for all customers; customer account users can only modify branding information for specified customer accounts. Common users in a customer account can only view branding information for their customer account. This allows users from specific customer accounts to view tailored branding information in all of the Data Collection Web activities.

Note: The *canCreateCustomerAccount* and *canRemoveCustomerAccount* activity features are only effective for system account users. Customer account users cannot create or remove customer accounts.

- Track the number of concurrent users for all activities.

Notes

- When branding options are defined, and you use the server name instead of the IP address, you must ensure that the primary server name is added to the *hosts* file or you must register the primary server name on your Domain Name Server (DNS).
- IBM® SPSS® Data Collection Interviewer Server Administration is installed with a default *System* customer account. If you do not want to create individual customer accounts, you will define user, role, project, and activity properties under the *System* customer account.
- The *System* customer account cannot be removed or deleted.

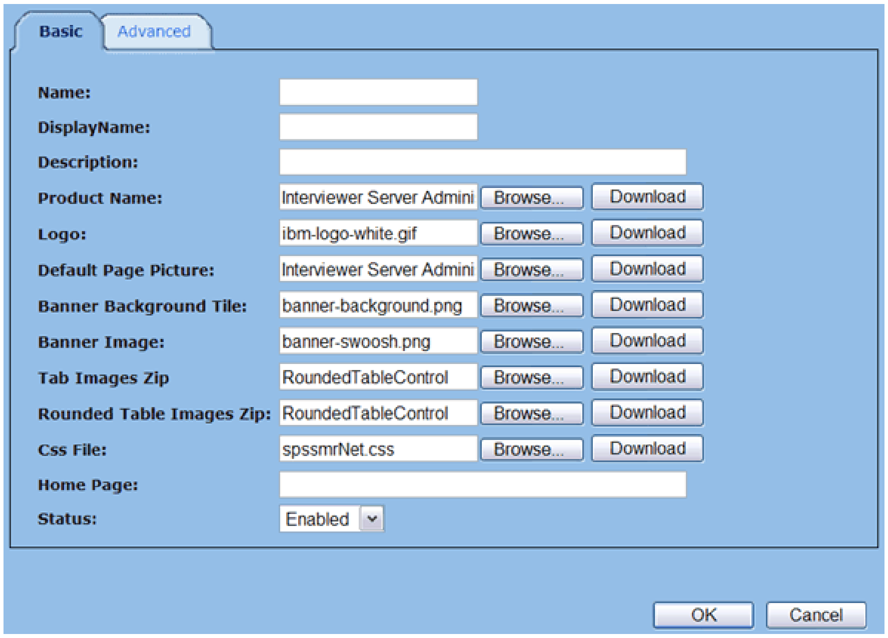
Adding a customer account:

▶ In the left tree, click the New Customer Account button.

Figure 1-10
New Customer Account button

The Customer Account dialog displays, providing options for configuring the account parameters:

Figure 1-11
New Customer Account dialog



Name: The customer account name. Enter an appropriate name (customer account names must be unique).

DisplayName: The customer account name as it will display for users. Enter an appropriate name.

Description: The customer account description. Enter an appropriate description.

Product Name: Identifies a product name image to use for the customer account. The default image size is 379 x 35.

Logo: Identifies a company logo image to use for the customer account. The logo displays as the top banner for most Data Collection web-based applications. The default image size is 41 x 15.

Default Page Picture: Identifies the default image that displays when each IBM® SPSS® Data Collection Interviewer Server activity launches. The default image size is 450 x 300.

Banner Background Tile: Identifies the banner's background image. The default image size is 1 x 45.

Banner Image: Identifies the banner image. The default image size is 577 x 45.

Tab Images Zip: Identifies a zip file that must contain a folder that includes the following files names:

tab.off.off.png (the default image size is 16 x 32)	tab.off.on.png (the default image size is 16 x 32)	tab.on.off.png (the default image size is 16 x 32)
tabend.off.png (the default image size is 13 x 32)	tabend.on.png (the default image size is 13 x 32)	tabfirst.off.png (the default image size is 15 x 32)
tabfirst.on.png (the default image size is 15 x 32)	tabmain.off.png (the default image size is 2 x 32)	tabmain.on.png (the default image size is 2 x 32)

The images contained in the folder are used by the Tab control.

Rounded Table Images Zip: Identifies a zip file that must contain a folder that includes the following files names:

dark_shading.png (the default image size is 10 x 29)	dark_topleft.png (the default image size is 10 x 30)
dark_topright.png (the default image size is 10 x 30)	light_bottomleft.png (the default image size is 10 x 10)
light_bottomright.png (the default image size is 10 x 10)	light_shading.png (the default image size is 8 x 30)
light_topleft.png (the default image size is 10 x 30)	light_topright.png (the default image size is 10 x 30)

The images contained in the folder are used by the Rounded table control.

CSS File: The cascading style sheet (CSS) that the customer account will use. The CSS file dictates the Data Collection web page layout, color, and fonts.

Browse and Download buttons

- Click Browse... to upload an existing file from your local file system to the Interviewer Server. Uploaded files are stored to the Interviewer Server in the *FMRoot\Shared\DataCollectionStyles* directory.
- Click Download... to download the default file from the Interviewer Server to your local file system. You can modify the default file and upload it back to the Interviewer Server.

Home Page: Identifies the home page URL for the specified customer. For example, if a customer account was created for IBM, the home page could be defined as *http://www.ibm.com*. Enter an appropriate home page URL.

Status: Indicates the customer account status. Select the appropriate setting.

▶ After defining the appropriate customer account settings, click OK to create new customer account. The new account displays in the My Projects pane.

Interviewer Server Administration creates a folder for the new customer account in FMRoot\Shared\DataCollectionStyles with the same name as the customer account name. User uploaded files for custom account branding are saved to this folder.

Note: Refer to Customer account customization for more detailed customization information.

Customer account customization

Much of the IBM® SPSS® Data Collection Interviewer Server Administration interface is customizable using a combination of *.css* files and uploaded images.

Basic Customization

Basic customization is accomplished through the User Administration activity. After launching the User Administration activity, select the account you would like to re-brand from the list on the left, and then select the edit properties icon from the toolbar above the account list. You are presented with a dialog that allows you to specify, upload, or download the following items:

- Name (read-only)
- Display name
- Description
- CSS file – you can specify styling for any item in the Interviewer Server Administration interface
- Logo – you can specify a new logo to replace the IBM logo (default dimensions are height:15px; width:41px)
- Default page picture – serves as the background image for activity launch pages (default dimensions are height:300px; width:450px)
- Display name image – displays the specified image instead of the default Interviewer Server Administration image
- Banner background image – changes the image used for the banner background
- Banner overlay image – changes the image that is centered on the banner
- Home page (read-only)
- Tab images – you can upload a zip file that contains a collection of images that is used to build the tabs within the Interviewer Server Administration interface

Changing the logo

By default, the logo is a 41px(width) by 15px(height) IBM logo. You may specify a new image in the *Edit Customer Account* dialog. The new image does not have to remain 15px by 41px. However, if you want an image of a different size, you will need to upload a *.css* file and specify something like the following:

```
#IsaBanner1_logo {height: HHpx;width:WWpx;margin-top:-Hpx;position:absolute;top:50%;right:10px}
```

- `IsaBanner1_logo` is the ID of the logo <img/> tag
- `HH` is the new image height
- `WW` is the new image width
- `H` is half the height of the new image

The new specification ensures that the image is centered vertically on the banner and 10px from the right edge of the browser window. It is recommended that the logo does not exceed the height of the banner (35px).

Changing the default page picture

By default, the page picture is 450px(width) by 300px(height). You should keep the same dimensions for this image when you customize it. You can upload the customized image via the *Edit Customer Account* dialog.

Changing the display name image

By default, the display name image is 35px tall. Depending on the browser width, this image will disappear if it begins to crowd the other banner elements. You can upload the customized image via the *Edit Customer Account dialog*. It is recommended that the image height does not exceed 35px. However, if you would like a shorter image you should specify the appropriate styling in the *.css* file in order to keep the image positioned properly. You could specify something like the following:

```
#IsaBanner1_bannerContainer{height:HHpx;margin-top:Hpx;position:relative:top:50%;}
```

- `IsaBanner1_bannerContainer` is the ID of the display name image
- `HH` is the new image height
- `H` is half the height of the new image

The new image can be any image mime type, although it is easier to use a mime type that supports transparency (such a *.png*).

Changing the banner background image

The banner background image is repeated along the x-axis of the control. As such, you should can keep it thin (1px) to help reduce download times. You can upload the customized image via the *Edit Customer Account* dialog. The new image can be any image mime type.

Changing the banner overlay image

By default, the banner overlay image is 577px(wide) by 45px(tall). Only the top 35px are visible in Interviewer Server Administration; the remaining 10px are clipped by the banner. When customizing this image, it is recommended to keep the image 577px wide and at least 35px tall. You can upload the customized image via the *Edit Customer Account* dialog. If you upload an image that is not the recommended size, you will need to create new rules in the .css file to properly handle the image. The banner overlay image uses an `<img>` tag with an ID of `IsaBanner1_swoosh`. The new image can be any image mime type.

Changing the tab images

The tab images must maintain the following names, file types, and sizes in order to work properly:

File name	Width	Height
tab.off.off.png	16	32
tab.off.on.png	16	32
tab.on.off.png	16	32
tabend.off.png	13	32
tabend.on.png	13	32
tabfirst.off.png	15	32
tabfirst.on.png	15	32
tabmain.off.png	2	32
tabmain.on.png	2	32

The customized tab images can be archived into a *.zip* file and uploaded via the *Edit Customer Account* dialog.

Advanced customization

When a customer account is created, a new folder is created in the shared location at *FMRoot\Shared\DataCollectionStyles\CustomerName*. Within this folder a *configure.xml* file, that drives the *Edit Customer Account* dialog, is also created. The *configure.xml* file provides advanced users finer control of the account re-branding settings. For example:

```
<Properties>
  <Property Name="Logo File">ibmLogo.png</Property>
  <Property Name="CSS File">ibmCSS.css</Property>
  <Property Name="Default Page Picture">ibmDefault.png</Property>
  <Property Name="Home Page Url">http://www.ibm.com/home.aspx</Property>
  <Property Name="BannerBG">mbbanner-bg.png</Property>
  <Property Name="BannerSwoosh">mbbanner-swoosh.png</Property>
  <Property Name="ProductName">mbproduct.png</Property>
  <Property Name="TabImages">TabImages</Property>
</Properties>
```

Property name	Edit customer account field	Relative path to file or directory from customer account directory	Notes
Logo file	Logo	ibmLogo.png	Replaces the ibm logo.
CSS File	CSS file	ibmCss.css	CSS stylesheet defining the custom style rules for the Interviewer Server Administration interface
Default Page Picture	Default page picture	ibmDefault.png	Launch page background image.
Home Page Url	Home page	http://www.ibm.com/home.aspx	Customer web page.
BannerBG	Banner background image	mbbanner-bg.png	Background image for top the banner.
BannerSwoosh	Banner overlay image	mbbanner-swoosh.png	Background image in the center of the top banner.

Property name	Edit customer account field	Relative path to file or directory from customer account directory	Notes
ProductName	Product name image	mbproduct.png	The product name as an image in the top banner.
TabImages	Tabs images	TabImages	Directory containing all the images used to create the tabs.

It is possible to organize a customer account using directories. For instance, you can create an *images* directory to store all your account images. You will need to update the *configure.xml file* when using directories (for example, <Property Name="Logo File">images/ibmLogo.png</Property>).

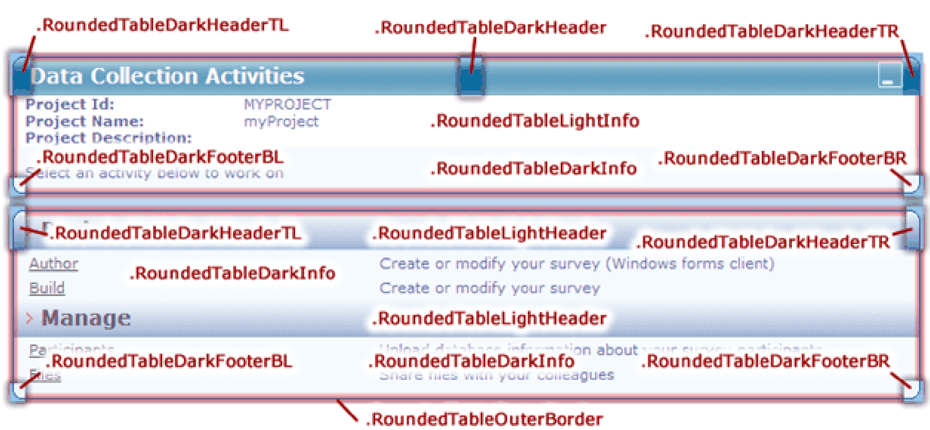
Restyling IBM SPSS Data Collection Interviewer Server Administration interface elements in .css

Finer control of the Interviewer Server Administration interface style can be accomplished via a custom *.css* file. Basic elements such as the logo image may be re-dimensioned or repositioned through the *.css* file. More complex elements can be restyled as well.

Rounded tables

Rounded tables are created using a collection of *.css* classes that define **Dark** (dark headers) or **Light** (light headers) tables, and are based on the HTML table structure. The outline color of the table is set using a special class and the inside background color is also set using a class name.

Figure 1-12
Rounded table example



The previous example includes all of the different class names used to style the rounded table elements. The following table provides a short description for each class.

Class name	Description
.RoundedTable	Table element representing a rounded table.
.RoundedTableDarkHeaderTL	Top-left corner of a dark headed rounded table.
.RoundedTableDarkHeader	Middle part of the top banner in a dark headed rounded table.
.RoundedTableDarkHeaderTR	Top-right corner of a dark headed rounded table.
.RoundedTableLightHeaderTL	Top-left corner of a lightheaded rounded table.

Class name	Description
.RoundedTableLightHeader	Middle part of the top banner in a light headed rounded table.
.RoundedTableLightHeaderTR	Top-right corner of a light headed rounded table.
.RoundedTableDarkInfo	Cells in rounded table that should have a darker background. The cells in the last row of a rounded table always have this class name.
.RoundedTableLightInfo	Cells in a rounded table that should have a lighter background.
.RoundedTableOuterBorder	Cells in a rounded table that act as a border. ■ If they act as a top or bottom border, they span multiple columns and have a 1px height. ■ If they act as a side border, they span multiple rows and have a width of 1px.

The following CSS example can be used to add a new CSS3 box –shadow to the rounded table control, change the background images used in the headers, and change the color of the table body cells.

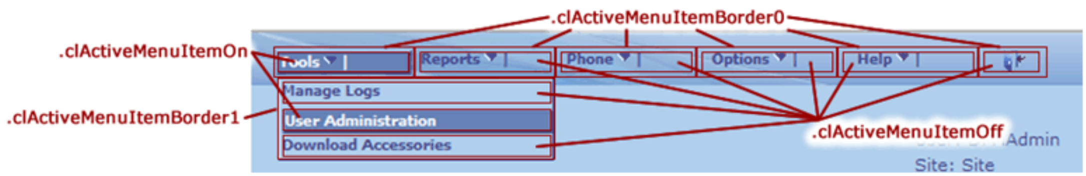
Note: The *.css* file should be saved to the customer account directory, and the table background images can be stored in a *Tables* directory within the customer account directory:

```
/*Rounded Tables ****************************/
.RoundedTable {background-color:transparent;font-family:helvetica,tahoma,arial;
    -moz-box-shadow:3px 3px 5px #333;
    -webkit-box-shadow:3px 3px 5px #333;
    box-shadow:3px 3px 5px #333;
}
.RoundedTable td.RoundedTableOuterBorder {background-color:#000}

/*header*/
/*Dark Headers for rounded tables*/
.RoundedTable td.RoundedTableDarkHeader, .RoundedTable td.RoundedTableDarkHeaderTL, .RoundedTable td.R
    margin:0;padding:0
}
.RoundedTable td.RoundedTableDarkHeader {background-image:url(Tables/tabmainon.png);}
.RoundedTable td.RoundedTableDarkHeaderTL {background-image:url(Tables/tabfirston.png);}
.RoundedTable td.RoundedTableDarkHeaderTR {background-image:url(Tables/tabendon.png);background-positi

/*Light Headers for rounded tables*/
.RoundedTable td.RoundedTableLightHeader, .RoundedTable td.RoundedTableLightHeaderTL, .RoundedTable td
    margin:0;padding:0;border-bottom:1px solid #888;
}
.RoundedTable td.RoundedTableLightHeader {background-image:url(Tables/tabmainoff.png);}
.RoundedTable td.RoundedTableLightHeaderTL {background-image:url(Tables/tabfirstoff.png);background-po
.RoundedTable td.RoundedTableLightHeaderTR {background-image:url(Tables/tabendoff.png);background-posi

/*Table-body for rounded tables*/
.RoundedTable td.RoundedTableDarkInfo {background-image:none;background-color:#EEE}
.RoundedTable td.RoundedTableLightInfo {background-image:none;background-color:#F5F5F5}

/*footer for rounded tables*/
.RoundedTable td.RoundedTableDarkFooter {background-image:none;background-color:#EEE}
.RoundedTable td.RoundedTableDarkFooterBL, .RoundedTable td.RoundedTableDarkFooterBR {background-image
.RoundedTable td.RoundedTableDarkFooterBL div, .RoundedTable td.RoundedTableDarkFooterBR div {margin:0
.RoundedTable td.RoundedTableDarkFooterBL div {border-left:1px solid #000;}
.RoundedTable td.RoundedTableDarkFooterBR div {border-right:1px solid #000;}
```

Top menu items

The drop-down menu system at the top of most Interviewer Server Administration pages consists of a collection of div elements with various class names.

Figure 1-13
Menu elements example



The previous example includes all of the different class names used to style the menu elements. The following table provides a short description for each class.

Class name	Description
.clActiveMenuItemBorder0	Each menu item at the top level of the menu system is contained by a div with this class name.
.clActiveMenuItemBorder1	The drop-down container for the submenu items is a div with this class name.
.clActiveMenuItemOn	Menu items that are hovered or active have this class name.
.clActiveMenuItemOff	The normal state for menu items that use this class name.

The following *.css* example sets different colors, adds a css3 transition effect for the menu items based on whether they are active or inactive, and adds a rounded border to active top-level menu items.

```
/*Menus *******************************************/
/*General menu item properties */
.clActiveMenuItemOff, .clActiveMenuItemOn, .clInactiveMenuItem{
    position: absolute;margin:0;padding:0 3px;font-family: helvetica,tahoma,arial;font-weight: normal;
    cursor: hand;font-weight:bold;
}
/*Active MAIN menu item*/
.clActiveMenuItemBorder0 .clActiveMenuItemOn  {
    background-color:#666;opacity:1;background-repeat:repeat-x;border:1px solid black;
    -moz-border-radius: 5px;
    -webkit-border-radius:5px;
    border-radius:5px;
    -moz-transition:all .3s ease-in-out;
    -webkit-transition:all .3s ease-in-out;
    transition:all .3s ease-in-out;
}
/*Inactive MAIN menu item*/
.clActiveMenuItemBorder0 .clActiveMenuItemOff {}

#oCMenu_mnuExitToLogin img, #oCMenu_mnuRefresh input {
    visibility:hidden;
}

/*Submenu container */
.clActiveMenuItemBorder1 {background-color:#888;border:#333;
    -moz-box-shadow:2px 2px 5px #000;
    -webkit-box-shadow:2px 2px 5px #000;
}

/*all submenu items */
.clActiveMenuItemBorder1 .clActiveMenuItemOn, .clActiveMenuItemBorder1 .clActiveMenuItemOff{
    border:1px solid #888;
}
/*submenu, non selected items */
.clActiveMenuItemBorder1 .clActiveMenuItemOff {background-color:#888;
-moz-transition:background-color .3s ease-in-out;
-webkit-transition:background-color .3s ease-in-out;
transition:background-color .3s ease-in-out;}

/*Active submenu item*/
.clActiveMenuItemBorder1 .clActiveMenuItemOn {background-color:#666;
```

```
-moz-transition:background-color .3s ease-in-out;
-webkit-transition:background-color .3s ease-in-out;
transition:background-color .3s ease-in-out;}
```

Sample customization themes

Two customization themes are installed with the IBM® SPSS® Data Collection Developer Library that allow you to customize the user interface for customer accounts.

- **Black** - This new black theme can be used to customize the user interface for customer accounts.
- **Simple** - This new simple theme can be used to customize the user interface for customer accounts.

The samples are installed with the Data Collection Developer Library at: [INSTALL_FOLDER]\IBM\SPSS\DataCollection\6\DDL\ISA Rebranding.

Editing customer accounts

▶ In the left tree, select the appropriate customer account.

▶ Click the Edit Customer Account button.

Figure 1-14


▶ Make the appropriate changes and click OK when finished.

You can change all settings except for the customer account name. Refer to Adding customer accounts for more detailed information on each customer account option.

Removing customer accounts

Removing a customer account effectively removes all of the account's users, roles, and projects.

▶ In the left tree, select the appropriate customer account.

▶ Click the Remove button.

▶ Confirm the request when prompted to do so.

Adding users

Each IBM® SPSS® Data Collection Interviewer Server Administration user must have a unique name and password. The name must be unique not just within the collection of user names but also within the Interviewer Server Administration role names. When you add a user, you define that user's Interviewer Server Administration password and specify whether the user can change that password and whether this must be done the first time that the user logs in. Users who are allowed to change their passwords will see a Change Password option in the Tools menu. You may also assign the user to one or more roles.

Note: If you are using customer accounts, users added to a specific customer account will only have access to the roles, projects, and activities that are defined for the specific customer account. Refer to Adding customer accounts for more information regarding customer accounts.

The names that you set up can be domain or workgroup names, or they can be other names that exist in Interviewer Server Administration only. For example, a user called Ben Johnson might log in to the domain as *SPSS\bjohnson* but might have an Interviewer Server Administration user name of *ben*.

Interviewer Server Administration creates a folder for the new user in *FMRoot\Users* with the same name as the user name. If you are using domain or workgroup user names as Interviewer Server Administration login names, the \ in the domain or workgroup name is converted to an underscore in the folder name. For example, the folder name for *SPSS\bjohnson* is *SPSS_bjohnson*. Because of this, do not create Interviewer Server Administration user names that result in folder names that match those required for domain or workgroup names. In the example, avoid *SPSS_bjohnson* as a Interviewer Server Administration user name.

When a user creates a new project, Interviewer Server Administration creates a project folder with unique name based on the user's Interviewer Server Administration user name. Interviewer Server Administration does not support Japanese characters in pathnames, so make sure that any user accounts that you create do not contain Japanese characters.

Users can optionally have user properties assigned to them. These define special abilities or qualifications that the user has in relation to one or more activities. Typically, they are used to set up interviewer qualifications that are used in determining which records each interviewer receives for calling.

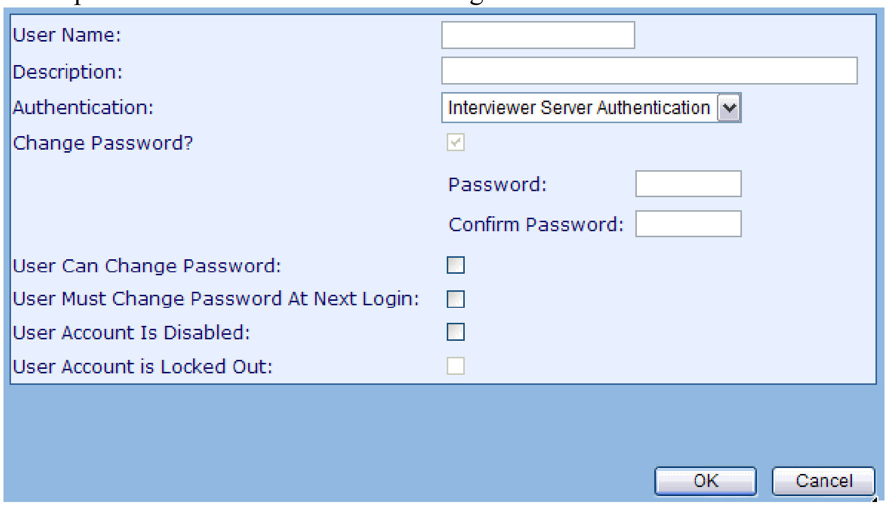
Adding a new user:

- In the left tree, click Users under the appropriate customer account. If you are not using customer accounts, click Users under the System account.

  A list of current user names appears on the right of the screen.

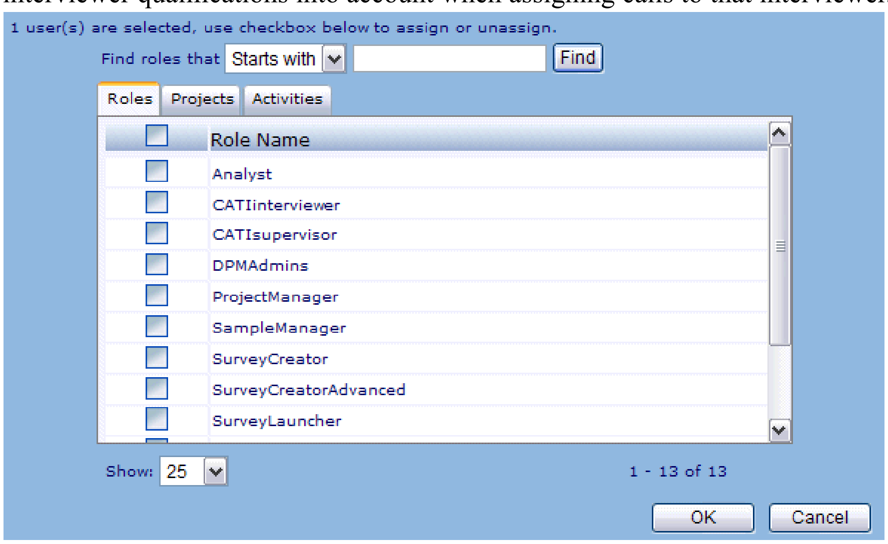
- Click New User....

  This opens the User Administration dialog box.



- Complete the fields in the dialog box and click OK.

- On the next dialog box, select the roles, projects, and activities to which the user should be added and click OK. If you are creating an interviewer account, you must assign that user to the CATIinterviewer role if you want IBM® SPSS® Data Collection Interviewer Server to take interviewer qualifications into account when assigning calls to that interviewer.



- If user property groups exist for the role you have chosen, you are presented a dialog box for each group listing the properties that can be set within that group.

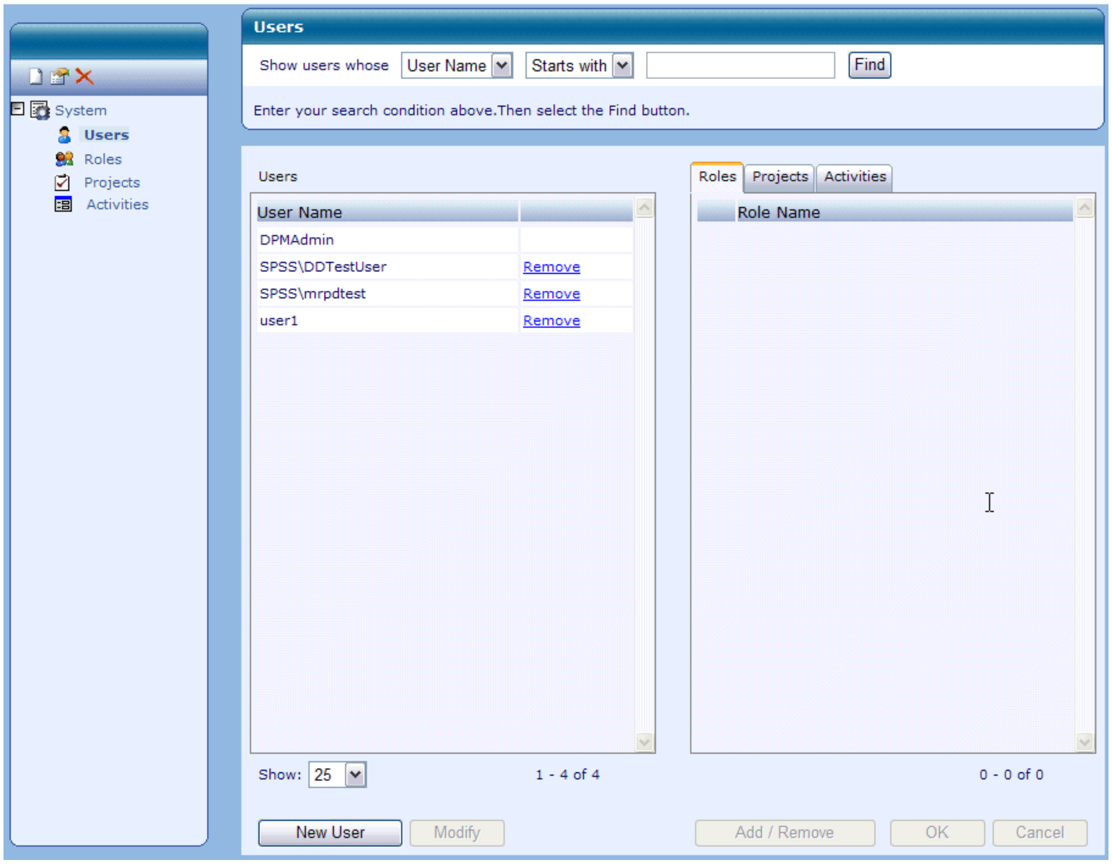
- To assign properties, select them in the Options lists. User Administration selects the applicable check box for each property you set.
- To cancel a property assignment, click the applicable check box for that property.
- Click OK when you are ready to continue. If there is more than one property group, the Assign User Properties dialog box is displayed for the next property group, otherwise you are returned to the main user details dialog box.

▶ Click OK to create the user account.

Removing users

▶ In the left tree, click Users under the appropriate customer account. If you are not using customer accounts, click Users under the System account.

A list of current user names appears on the right of the screen.



▶ Click Remove on the line for the user you want to remove.

▶ Confirm the request when prompted to do so.

Adding roles

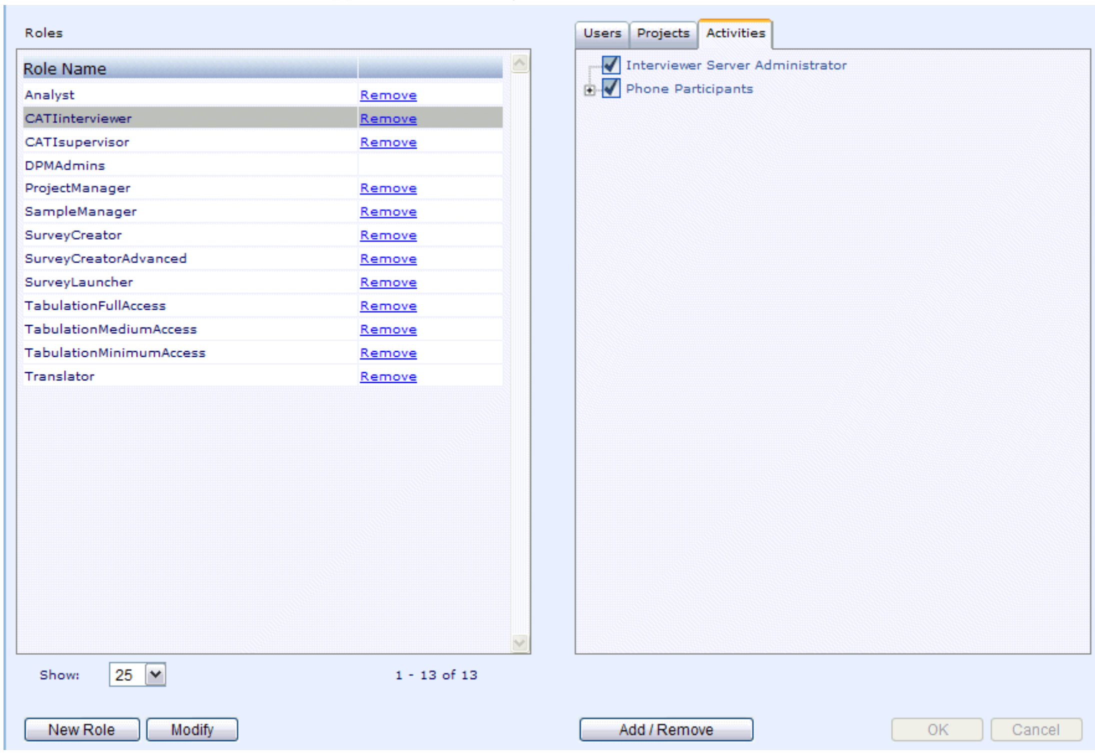
Roles group users into functional groups usually based on the activities that the user needs to run within IBM® SPSS® Data Collection Interviewer Server Administration. For example, members of the *Scriptwriters* role may be able to run activities to do with designing and building questionnaires, such as Build, and Launch, but not other activities, whereas members of the *Analysts* role may be able to run activities to do with viewing and exporting interview data, such as Survey Results and Export Data, but not the design and build activities.

Role names must be completely unique: you cannot create a role with the same name as a user.

Note: If you are using customer accounts, roles added to a specific customer account will only have access to the users, projects, and activities that are defined for the specific customer account. Refer to Adding customer accounts for more information regarding customer accounts.

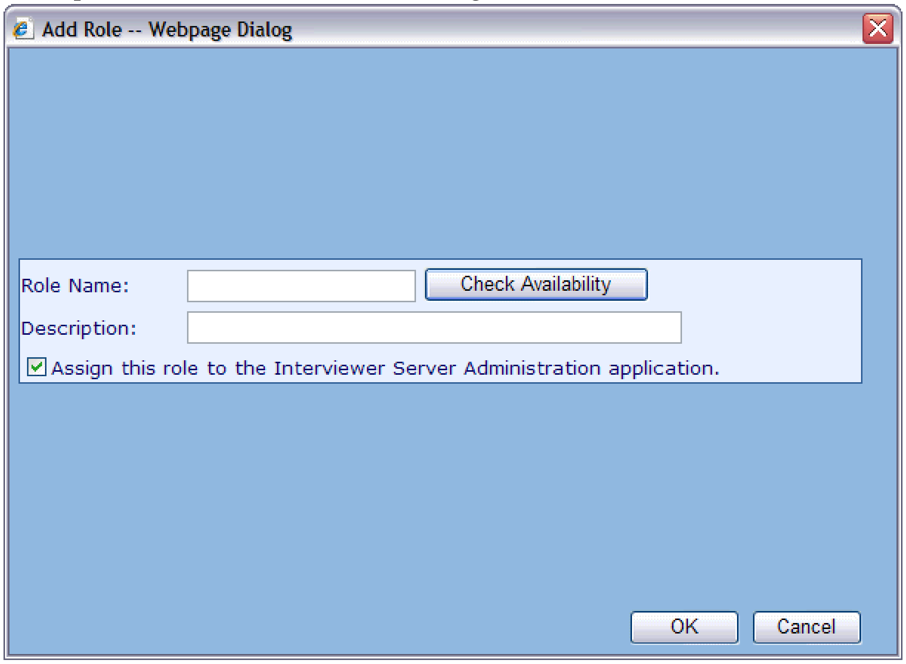
▶ In the left tree, click Roles under the appropriate customer account. If you are not using customer accounts, click Roles under the System account.

A list of current role names appears on the right of the screen.



- Click New Role....

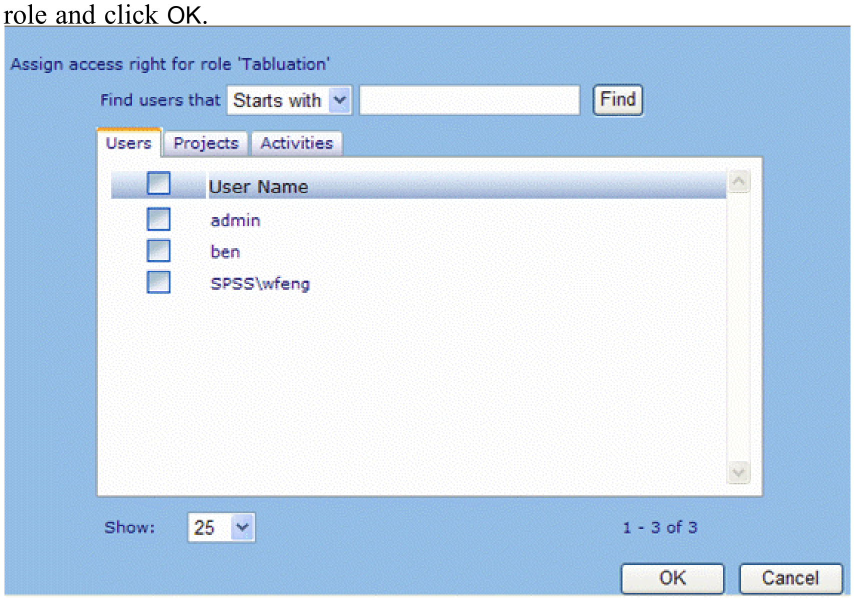
  This opens the User Administration dialog box.



- Complete the fields in the dialog box and click OK to create the new account.

  In the dialog box, Assign this role to the Interviewer Server Administration application is selected by default to ensure that members of this role can run Interviewer Server Administration. You should not normally need to cancel this option.

- On the next dialog box, select the users, projects, and activities that should be added to this role and click OK.



Removing roles

- In the left tree, click Roles under the appropriate customer account. If you are not using customer accounts, click Roles under the System account.

  A list of current roles appears on the right of the screen.

- Click Remove on the line for the role you want to remove.

- Confirm the request when prompted to do so.

Assigning users to roles

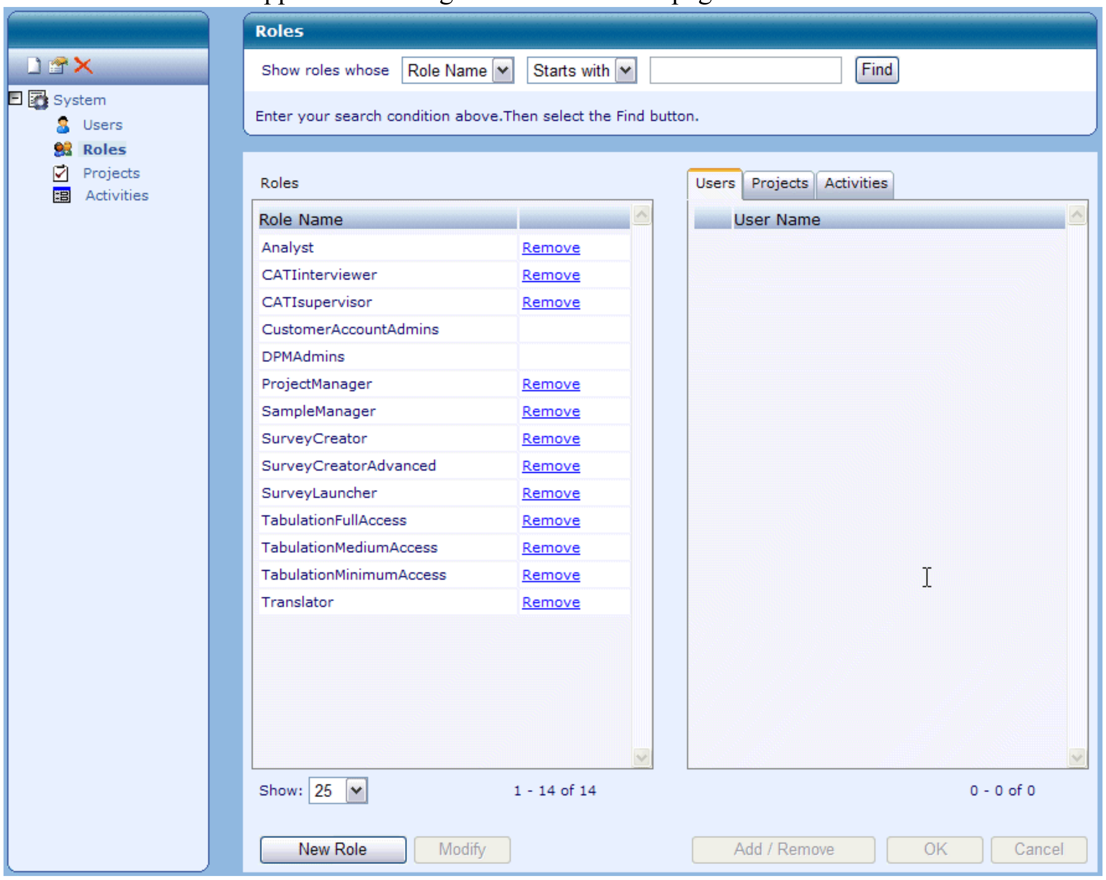
You can assign users to roles when you add the user to IBM® SPSS® Data Collection Interviewer Server Administration, or as a separate task at a later date.

Note: If you want IBM® SPSS® Data Collection Interviewer Server to take interviewer qualifications into account when assigning calls to interviewers, you must make interviewers members of the CATIinterviewer role.

Either:

- In the left tree, click Roles under the appropriate customer account. If you are not using customer accounts, click Roles under the System account.

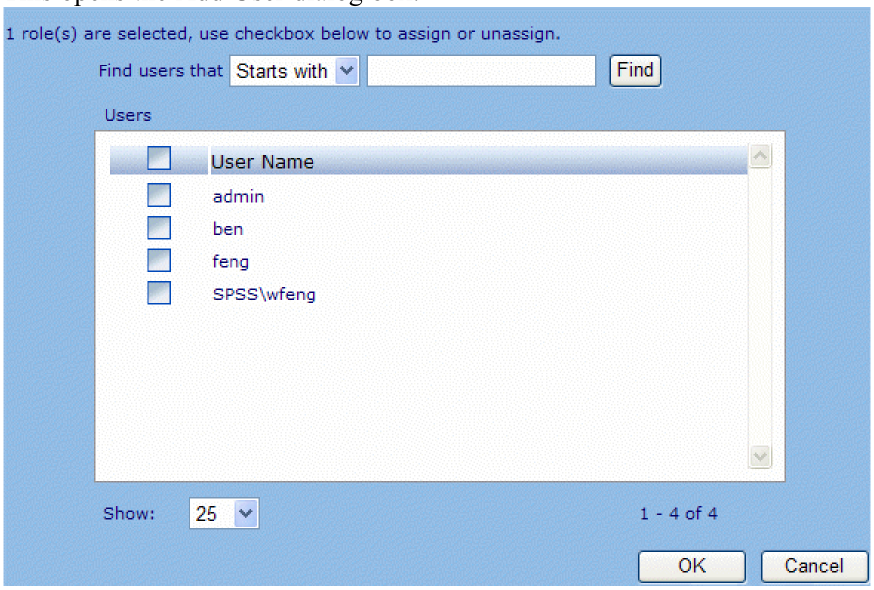
A list of current roles appears on the right-hand side of the page.



- Select the roles that you want to assign to the users.

- Click Add/Remove.

  This opens the Add User dialog box.

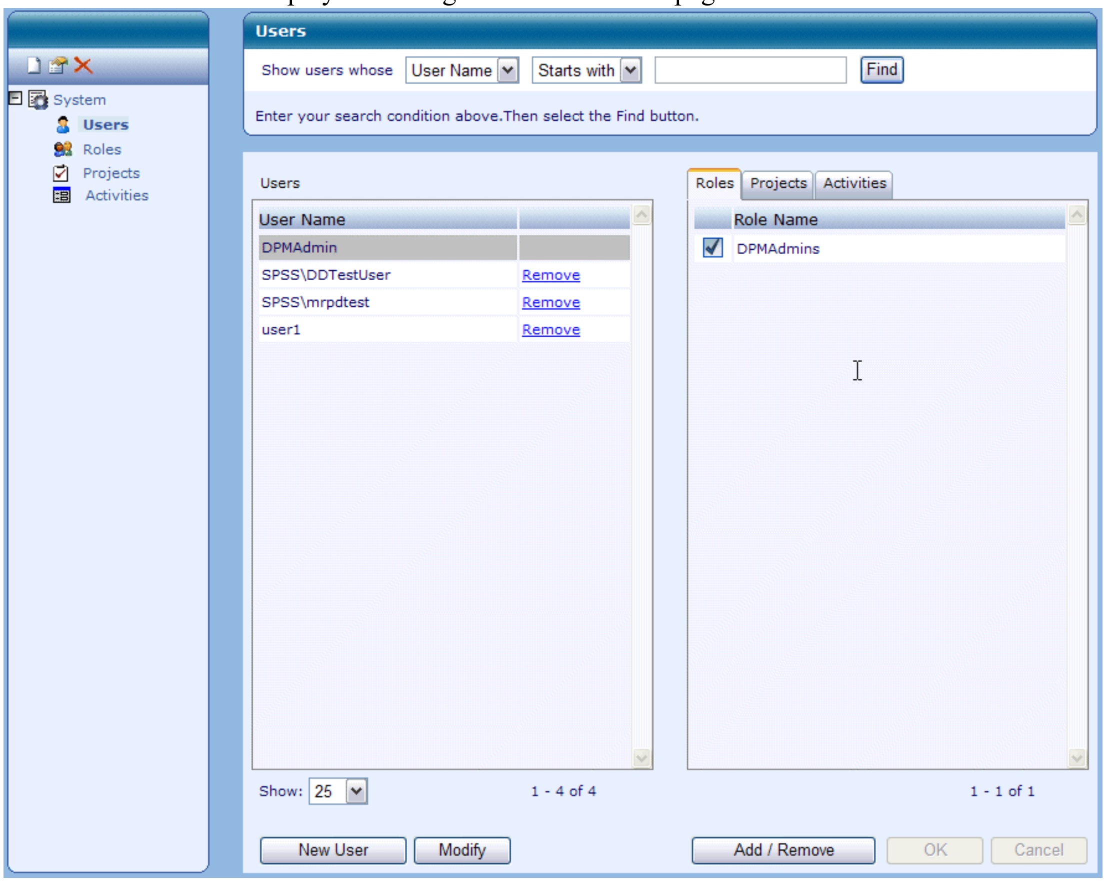


- Select the user names to be assigned to the role(s) and click OK.

Or:

▶ In the left tree, click Users under the appropriate customer account. If you are not using customer accounts, click Users under the System account.

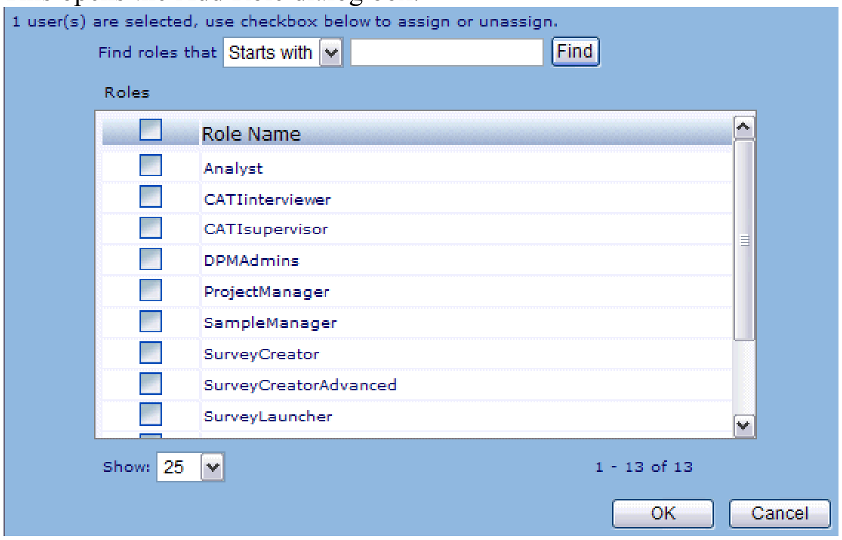
A list of current users displays in the right-hand side of the page.



▶ Select the users that you want to assign to the roles.

▶ Click Add/Remove.

This opens the Add Role dialog box.



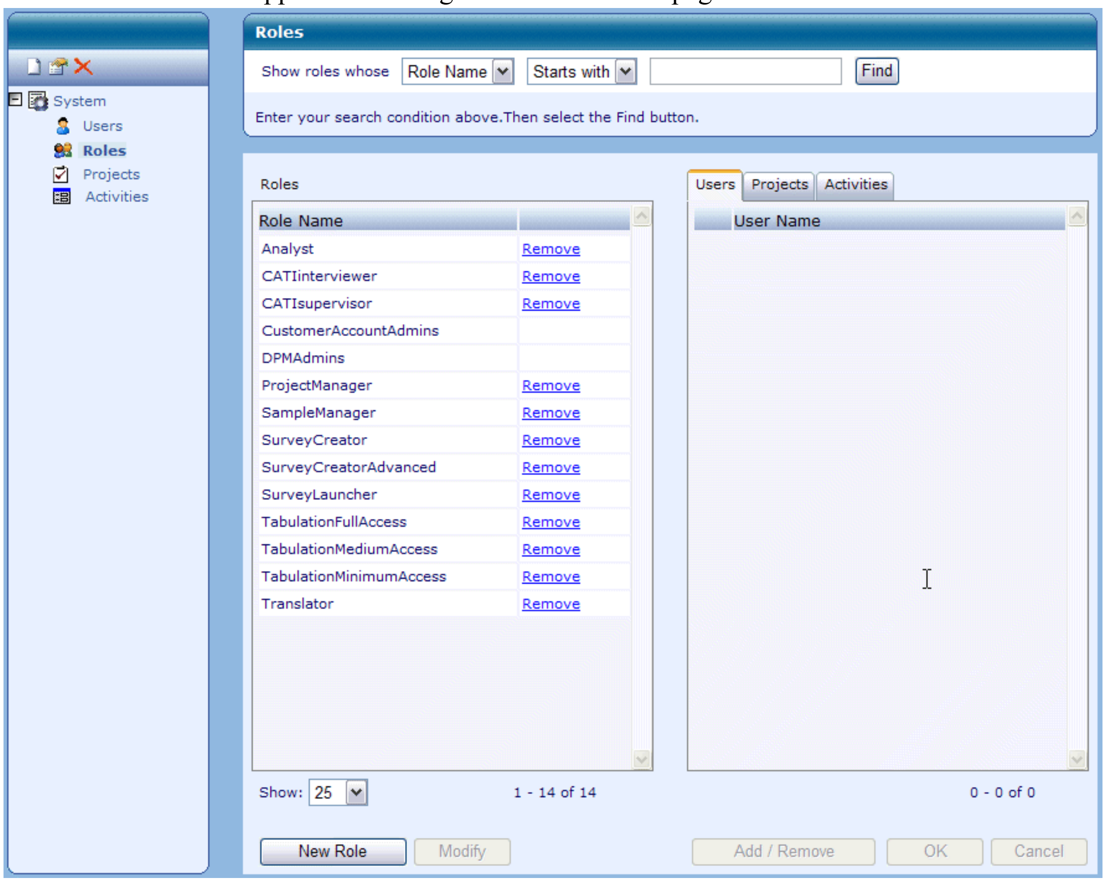
▶ Select the roles to which the user should be added and click OK.

Removing users from roles

Either:

- In the left tree, click Roles under the appropriate customer account. If you are not using customer accounts, click Roles under the System account.

A list of current roles appears on the right-hand side of the page.

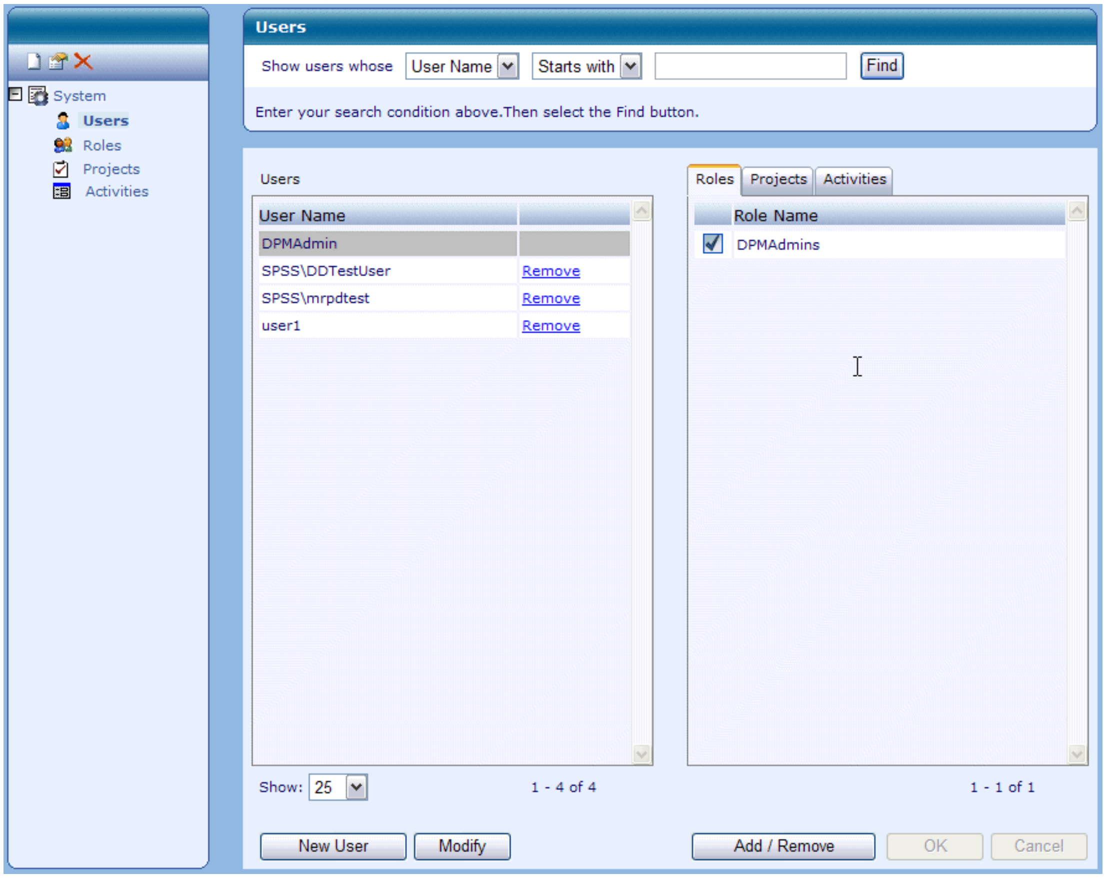


- Select the roles from which you want to remove users.
- A list of assigned users appears in the right-tab.
- Deselect the users you want to remove from the selected roles, and click OK.

Or:

- ▶ In the left tree, click Users under the appropriate customer account. If you are not using customer accounts, click Users under the System account.

A list of current users displays in the right-hand side of the page.



- ▶ Select the users for which you want to removes roles.
- ▶ A list of assigned roles appears in the right-tab.
- ▶ Deselect the roles you want to remove from the selected users, and click OK.

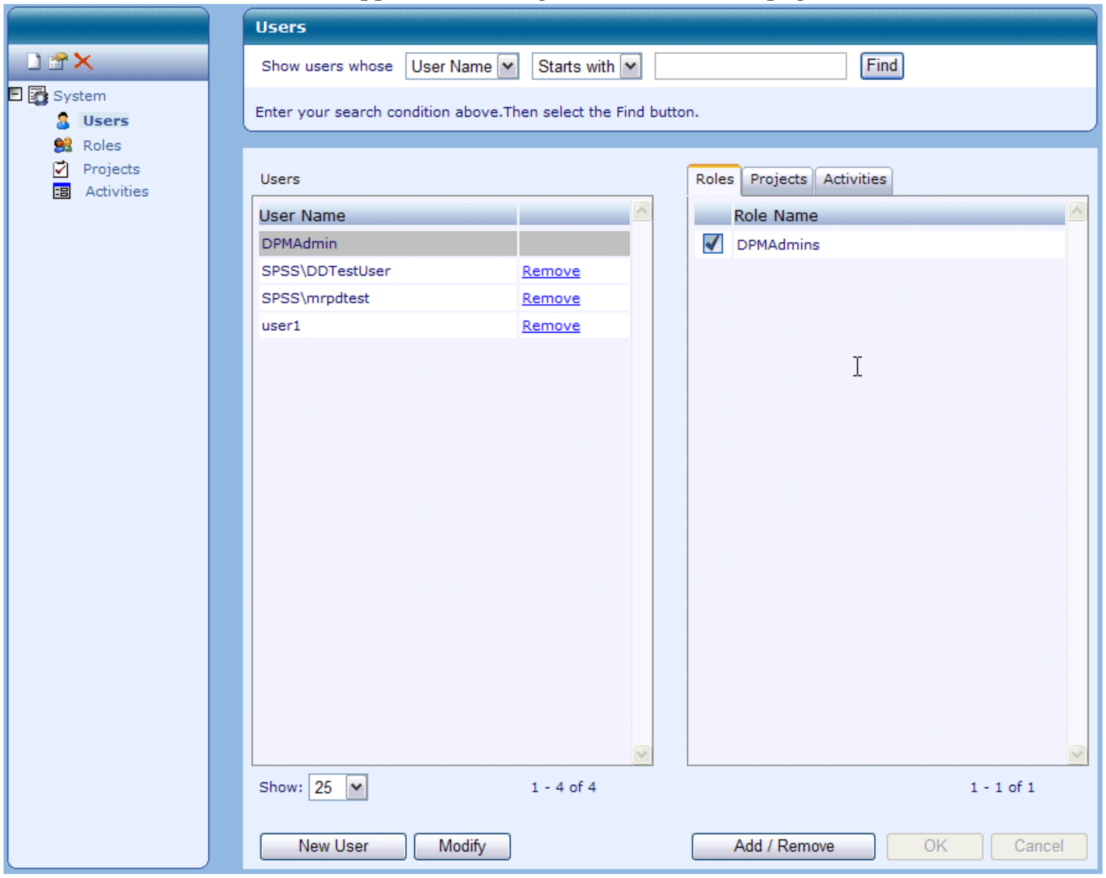
Modifying user accounts

You can change the details stored for a user account, the properties assigned to that user, and the roles to which that user is a member.

You can change a user's password by modifying the user's account details. Edit the user account and select the Change Password check box

- ▶ In the left tree, click Users under the appropriate customer account. If you are not using customer accounts, click Users under the System account.

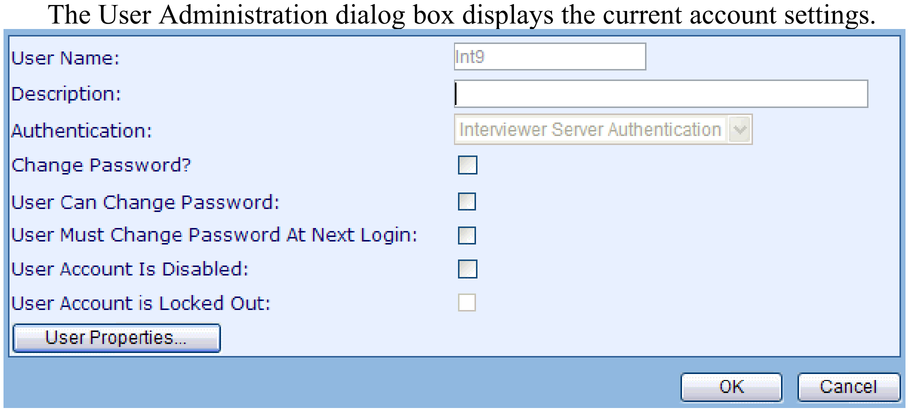
► A list of current role members appears on the right-hand side of the page.



► To change the user's account details:

■ Select the user that you want to modify from left tab and click Modify.

The User Administration dialog box displays the current account settings.



► Make your changes (you cannot change the user name).

If user properties have been defined in IBM® SPSS® Data Collection Interviewer Server Administration, the User Properties button is displayed. To assign new properties to this user or

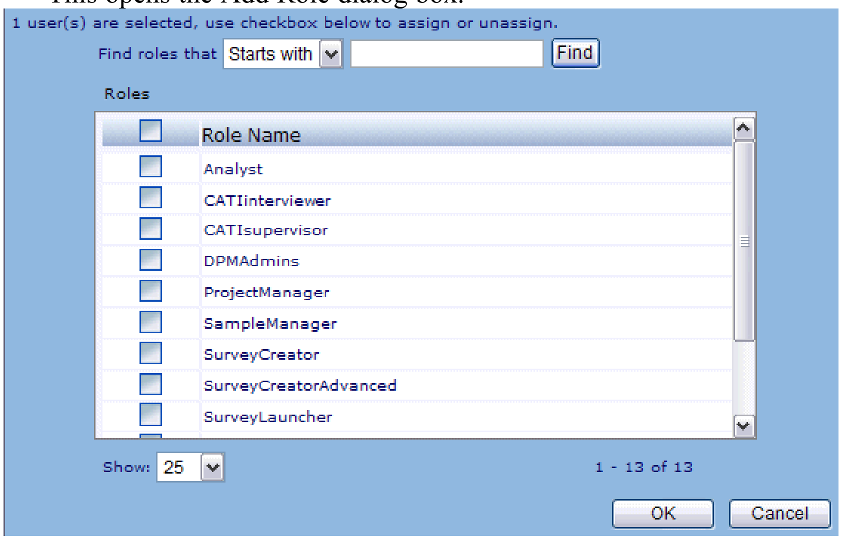
change existing assignments, click this button to open the Assign User Properties dialog box, and then make your changes and click OK to return to the user details dialog box.

▶ Click OK.

▶ To assign the user to one or more roles:

- Click Add/Remove.

  This opens the Add Role dialog box.



- Select the roles to which you want to add the user and click OK.

Creating user property groups

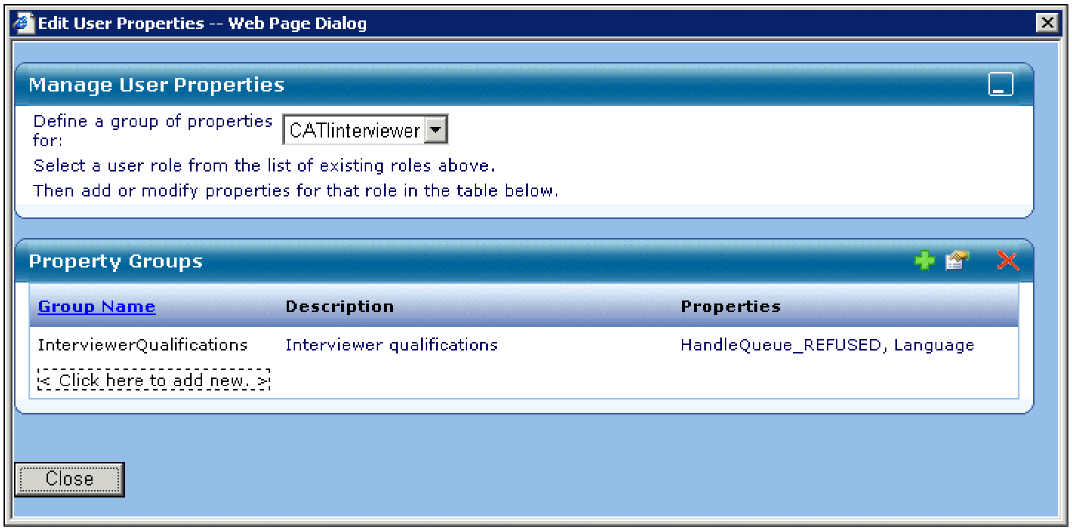
Figure 1-15
Edit user properties icon

Figure 1-16
Add property group icon

▶ Click the Edit user properties icon in the toolbar.

This opens the Edit User Properties dialog box.

Figure 1-17
Choose role for property group

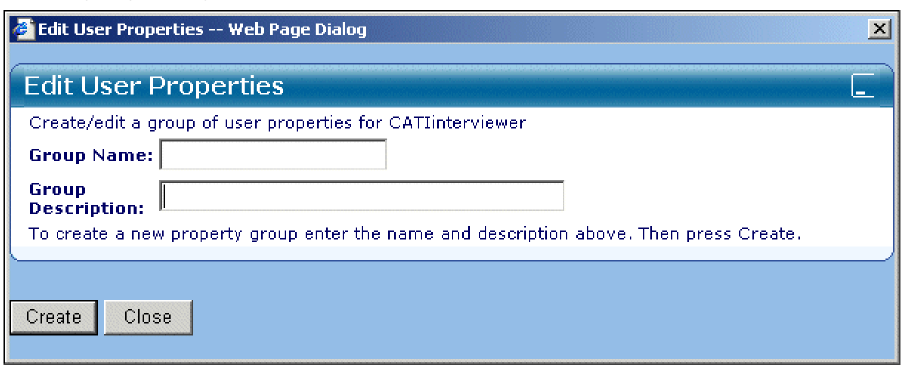


▶ In Define a group of user properties for:, select the role to which the property group refers.

▶ In the Property Groups frame, click the Add property group icon in the title bar or click <Click here to add new>.

This opens a new page in the dialog box.

Figure 1-18
Create group dialog box



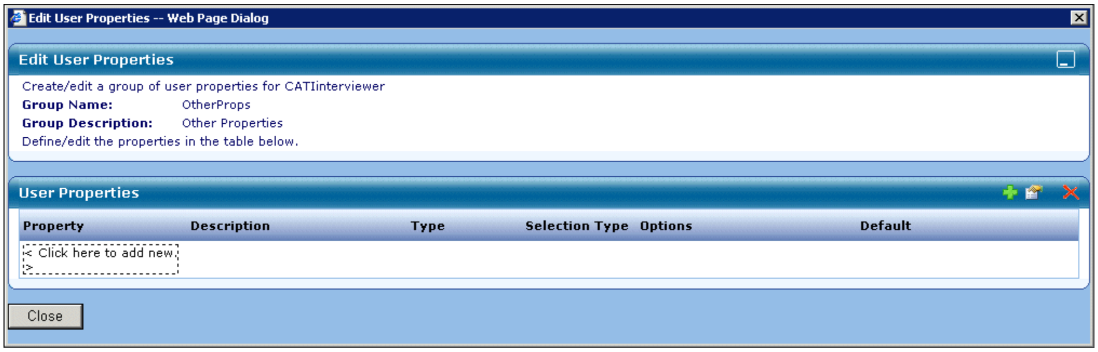
▶ In Group Name, type a name for the group you are creating. The group name for interviewer qualifications must be *InterviewerQualifications*.

▶ In Group Description, type a description of the group's function.

▶ Click Create.

You are returned to the previous page of the dialog box, which now provides facilities for adding properties to the group.

Figure 1-19
Empty property group page



Deleting user property groups

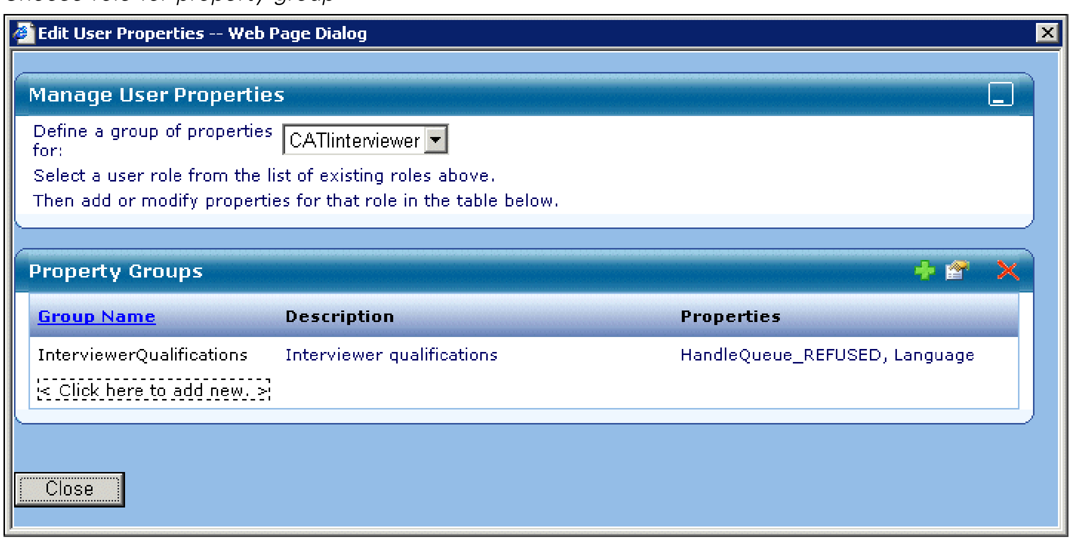
Figure 1-20
Edit user properties icon

Figure 1-21
Delete property group icon

- ▶ Click the Edit user properties icon in the toolbar.

This opens the Edit User Properties dialog box.

Figure 1-22
Choose role for property group



- ▶ In the Property Groups frame, select the property group you want to delete and click the Delete property group icon in the title bar.
- ▶ Confirm or cancel your request when asked to do so.

Adding properties to user property groups

Figure 1-23
Edit user properties icon

Figure 1-24
Add property group icon

User properties have the following components:

- A name that is used internally by IBM® SPSS® Data Collection Interviewer Server Administration and IBM® SPSS® Data Collection Interviewer Server activities.
- A description that is used in screens and dialog boxes displayed by activities.
- A data type. This is either Bool for a boolean (true/false) property or Category for a single text value or list of values.
- A selection type that specifies how many values the property may have.
- A list of possible values.
- A default value. This may be one of the values you define when you create the property or the special "Matches Any" setting. Use "Matches Any" when you do not want to choose any of the predefined values as the default. This default applies across all projects that an interviewer works on.

Interviewer qualifications

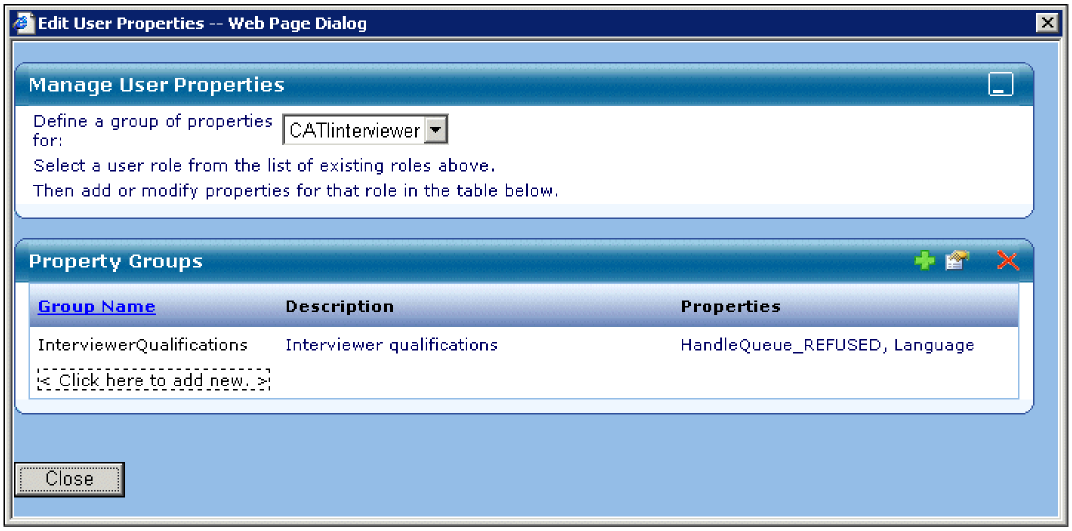
There are two types of interviewer qualification: those that are linked to a queue and those that are not. Qualifications related to queues must be called HandleQueue_*QueueName*; for example, HandleQueue_REFUSED for interviewers who are skilled at persuading respondents who have refused to be interviewed to reconsider their decision.

Interviewer qualifications that are not linked to queues are typically related to information present in the participant records. These qualifications must have the same name as the field in the sample record that stores the appropriate item of participant information. For example, if the interviewer qualification called Language defines the languages that an interviewer speaks, the field in the sample record that contains the respondent's native language must also be called Language. If you will be setting up this type of interviewer qualification you may need to liaise with whoever deals with participant records to ensure that the qualification names and sample field names match.

- Click the Edit user properties icon in the toolbar.

  This opens the Edit User Properties dialog box.

Figure 1-25
Choose role for property group



- In the Property Groups frame, click the group to which you want to add properties and, when the line is shaded in grey, click the Edit property icon in the frame's title bar.

  This opens a new page listing the properties defined for the group.

Figure 1-26
Create/edit user properties

- In the User Properties frame, click the Add property group icon in the title bar or click <Click here to add new>.

  This displays a dialog for adding a new property.

Figure 1-27
Add property to property group

- In Property, type a name for the property. Names may not contain spaces.

- In Description, type a description of the property.

- In Type, choose the property's data type. This must be one of:
  - *Category*. The equivalent of the response list to a categorical question. Used for properties such as languages spoken, gender, level of experience.
  - *Bool*. A pair of boolean values. Used for properties with Yes/No values, such as whether the interviewer is a refusal converter.

- In Selection Type, choose single if an interviewer may have only one of the property's values set, or multiple if interviewers may have more than one of the property's values set.

- In the Options box, type the possible values for this property. Values may be entered on separate lines or as a single, comma-separated list. You must enter at least one value. Options for boolean properties are displayed automatically.

- In the Default box, select the default value for the property. If you do not want to set a default value, choose Matches Any. When you create new user accounts, the default setting will be assigned to any interviewer for whom a more specific qualification is not set. For example, if you set Matches Any for a language qualification, any interviewer who does not have a specific language qualification set will be able to receive calls for respondents who speak any language at all.

- Click Apply.

- Repeat these steps to add other properties to the same group.

- Click Close to return to the Manage Users Properties page.

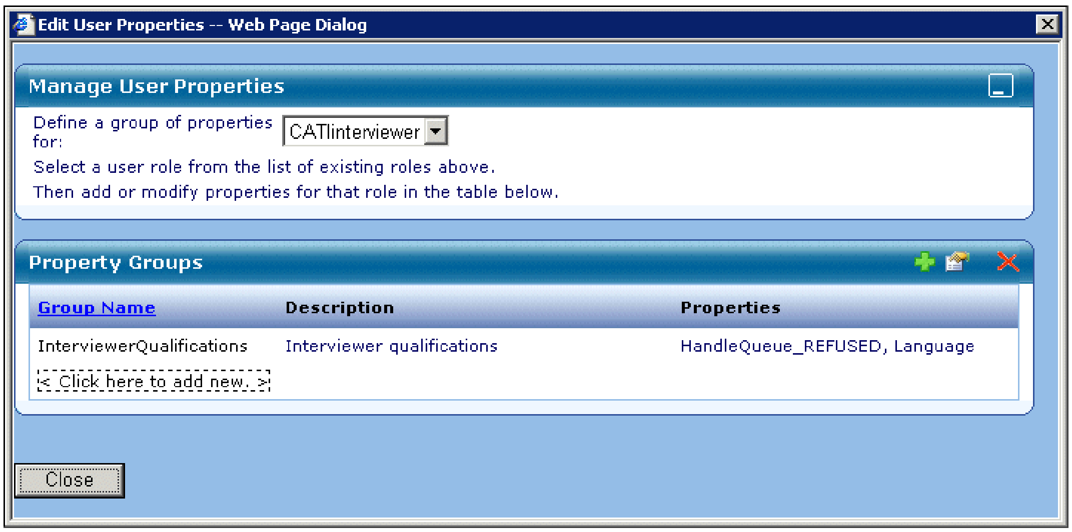
Changing a user property's definition

Figure 1-28
Edit user properties icon

▶ Click the Edit user properties icon in the toolbar.

This opens the Edit User Properties dialog box.

Figure 1-29
Choose role for property group



▶ In the Property Groups frame, click the group whose properties you want to change and, when the line is shaded in grey, click the Edit property icon in the frame's title bar.

This opens a new page listing the properties defined for the group.

Figure 1-30
Create/edit user properties

- In the User Properties frame, click the property you want to change and, when the line is shaded in grey, click the Edit property icon in the frame's title bar.

  This opens the property's definition for editing.

  Figure 1-31
  Add property to property group

- Make your changes as for creating new properties. If you add options in the middle of the list, they will appear at the end of the list when the pages are redrawn.

  Note: If you change a property's data type, User Administration warns you that this will invalidate all user assignments of this property and asks you to confirm that you wish to make this change. If you need to change the data type, you may find it easier to create a new property with a different name or to delete the property and recreate it with the new data type.

- Click Apply to save the changes and return to the properties list.

- Repeat these steps to change other properties.

- Click Close to return to the Manage Users Properties page.

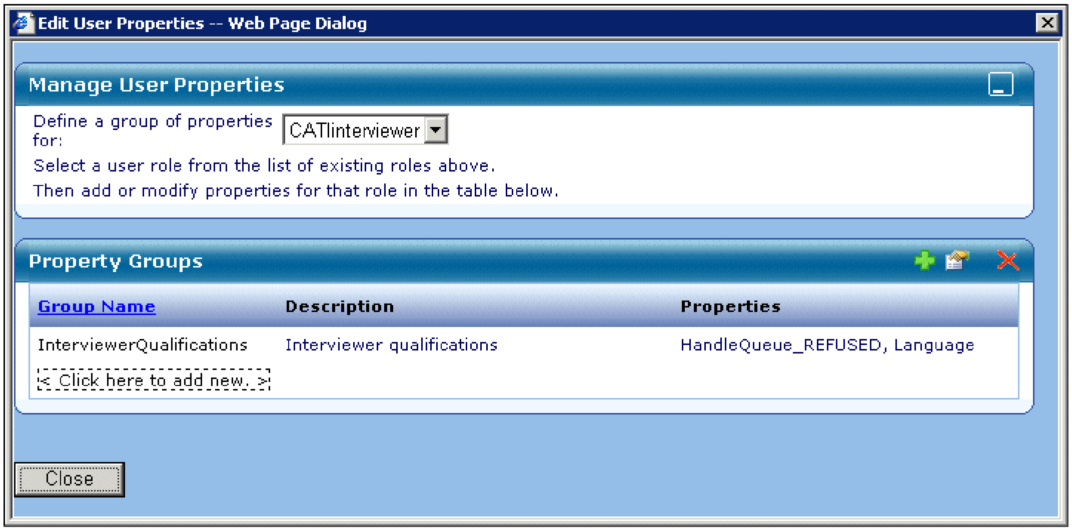
Deleting a user property

Figure 1-32
Edit user properties icon

▶ Click the Edit user properties icon in the toolbar.

This opens the Edit User Properties dialog box.

Figure 1-33
Choose role for property group



▶ In the Property Groups frame, click the group containing the property you want to delete and, when the line is shaded in grey, click the Edit property icon in the frame's title bar.

This opens a new page listing the properties defined for the group.

Figure 1-34
Create/edit user properties

▶ In the User Properties frame, click the property you want to delete and, when the line is shaded in grey, click the Delete property icon in the frame's title bar.

▶ Confirm or cancel your request when asked to do so.

▶ Click Close to return to the Manage Users Properties page.

Importing users and roles

When you first install IBM® SPSS® Data Collection Interviewer Server Administration it can be a tedious process to add each user and role manually, and then to assign users to roles and roles to projects. To help you with this, User Administration provides an import facility that lets you import this information from an Excel spreadsheet. Once you have the basic information in Interviewer Server Administration, you can then make more specific changes manually in the usual way.

If you import user and role settings that already exist, the following rules apply:

- Password definitions apply only to new accounts that are created by the import process. Passwords are never changed or removed for existing users even if the password column contains a value.
- If a description is defined for an existing user or role, the new description overwrites the existing one.
- If a role or project is specified for an existing user, the assignments are treated as additions to the user's current settings. For example, specifying the Manager2 role for a user who is already a member of the Manager1 role makes that user a member of both roles.
- Entering a blank role, project, or activity setting for a user does not delete the existing settings for that user. The only way to delete existing settings is to remove them manually using User Administration.
- Any users, roles, projects, activities, or user settings that are not mentioned in the spreadsheet remain unchanged. Any deletions must be made manually using the appropriate activity.
- Microsoft Excel 2007 files can only be used for importing users and/or roles when Microsoft Office 2007 or Microsoft Office Access Database Engine 2007 is installed on the server. Microsoft Office Access Database Engine 2007 can be downloaded directly from Microsoft *(http://www.microsoft.com/downloads/details.aspx?displaylang=en&FamilyID=7554f536-8c28-4598-9b72-ef9*

▶ Create the spreadsheet.

▶ In the left tree, select the appropriate customer account. If you are not using customer accounts, select the System account.

▶ Select Import from the Files menu. This displays the Upload File dialog box.

▶ Enter the full pathname of the Excel spreadsheet file or use the Browse button to select it and then click OK.

▶ User Administration reads the file and checks it for errors and inconsistencies. If it finds anything amiss, it reports it in a message box and asks whether you wish to continue with the import. Typical errors are naming nonexistent properties or projects, and naming users that do not currently exist in Interviewer Server Administration and that are not created by the spreadsheet. Click OK to continue or Cancel to stop without importing anything.

If you continue with the import, a progress dialog box displays confirmation messages as each stage of the import process completes. At the end of the import, a list of errors is displayed. Click Close to close the dialog box.

Setting up the spreadsheet

IBM® SPSS® Data Collection Developer Library comes with a sample spreadsheet you can modify to suit your needs. It contains basic documentation about how the spreadsheet is set up and which columns you must create. The file is called *UsersAndRoles.xls* and it is normally installed in [INSTALL_FOLDER]\IBM\SPSS\DataCollection\6\DDL\Administration Tools.

The Excel spreadsheet can have any or all of the following worksheets: Roles, Users, Projects, Activities, UserProperties, and GlobalFilters. If a worksheet does not exist then that part of the import process is not run. The worksheets must be set up as follows:

Roles

Names the roles to be added to IBM® SPSS® Data Collection Interviewer Server Administration. It must contain a column called RoleName that names the roles you want to add. It is also a good idea to include a Description column that describes the roles. Descriptions of up to 250 characters are valid. For example:

RoleName	Description
ProjMan	Project Managers
Scriptwriter	Scriptwriters
Analysis	Data export and analysis

If you import an existing role, the description in the spreadsheet overwrites the existing one in the Interviewer Server Administration database.

Users

Names the users to be added to Interviewer Server Administration. The worksheet must contain a column called *UserName* that names the users you want to add. It may also contain *Description*, *Password*, *Roles*, *Action*, and *Position* columns. Descriptions may be up to 250 characters long. The *Roles* column lists the roles of which each user is a member. If the user is a member of more than one role, the names must be separated by semicolons. The *Action* column has three options: Disable/D (disable an existing user), Remove/R (remove an existing user), Add/A (add a new user). The *Position* column indicates the interviewer's position in the telephone room (seat number, for instance). For example:

UserName	Description	Password	Roles	Action	Position
benjamin	Benjamin Brown	Rabb1ts	ProjMan;Scriptwriter;Analysis	Add (or A)	1
jose	Jose Mendoza	J6KTSY	Scriptwriter	Disable (or D)	2
davinder	Davinder Patel	Pandora99	Analysis	Remove (or R)	3

Notes:

- If the *Action* column is not defined in the spreadsheet, the user records are processed as normal. This means that when the user exists in user database, the user description, password, and role assignment are updated. Otherwise the user is added to the user database.
- The *Position* column is required when using the IBM® SPSS® Data Collection Load Tool Interviewer Logins interface. Refer to the Load Tool Object Model Reference for more information.

If you import an existing user, the description in the spreadsheet overwrites the existing one in the Interviewer Server Administration database. If roles are specified, the user is added to these roles if hew/she is not already a member; for example, specifying the Manager2 role for a user who is already a member of the Manager1 role makes that user a member of both roles. Leaving the role column blank does not remove the user from the roles to which he/she currently belongs: you must do this manually.

Password definitions apply only to new accounts that are created by the import process. Passwords are never changed or removed for existing users even if the password column contains a value.

Projects

Assigns roles to projects. The worksheet must contain two columns called ProjectID and Roles listing the project names and the roles to be assigned to each project. Role names in a list must be separated by semicolons. The ProjectID field must contain the project's uppercase ID, not it's name. By default, Interviewer Server Administration creates projects with the same name and ID, except that the ID is in upper case. For example:

ProjectID	Roles
SOFTDRINKS	ProjMan;Scriptwriter;CATIsupervisor;CATIinterviewer;Analysis
TRAVEL	ProjMan;Scriptwriter;Analysis

Role assignments for existing projects are added to the current settings. The only way to delete roles from projects is to remove the roles manually using User Administration.

Activities

Activities and activity features available to each role. The worksheet must contain two columns called Activity and Roles, but may also contain a Features column. Each line defines one activity or activity and feature combination, and the roles that may use that activity or feature. Roles in a list must be separated by semicolons. For example:

Activity	Feature	Roles
Launch		ProjMan;Scriptwriter;Analysis
Launch	canUnlockProject	ProjMan;Scriptwriter
ProjectEditor		ProjMan;Scriptwriter;Analysis
ProjectEditor	canCreateProjects	ProjMan;Scriptwriter;Analysis
ProjectEditor	canSetProjectState	ProjMan;Scriptwriter;Analysis
ProjectEditor	canAlterProperties	ProjMan

Activities and activity features have two names: an internal one that Interviewer Server Administration uses, and an external one that is more descriptive and that you see on the Interviewer Server Administration screens. You must use Interviewer Server Administration's internal names in the spreadsheet.

Display name	Internal name	Roles assigned to this activity or feature by default[1]
Activation	Activation	

Display name	Internal name	Roles assigned to this activity or feature by default[1]
— Can activate in test mode 4	CanActivateInTestMode	ProjectManager SampleManager SurveyCreator SurveyCreatorAdvanced SurveyLauncher
— Can activate in go-live mode 4 (dependent on permission to Can activate in test mode)	CanActivateInLiveMode	SampleManager SurveyCreatorAdvanced SurveyLauncher
— Can activate restricted script 4	CanActivateRestrictedScript	
— Can edit advanced activation settings 4 (dependent on permission to Can view advanced activation settings)	CanEditAdvancedSettings	SampleManager SurveyCreatorAdvanced SurveyLauncher
— Can view advanced activation settings 4	CanViewAdvancedSettings	ProjectManager SampleManager SurveyCreatorAdvanced SurveyLauncher
Activation History	ActivateReporter	
Author	Author	Analyst ProjectManager SampleManager SurveyCreator SurveyCreatorAdvanced SurveyLauncher Translator
Create/Open/Save Questionnaire		
— Can save questionnaire file to local directory	— CanSaveFileToLocalDirectory	SurveyCreator SurveyCreatorAdvanced
— Can save edited questionnaire file to server	— CanSaveFileToServer	Analyst SurveyCreator SurveyCreatorAdvanced Translator
Manage Languages and Contexts		
— Can edit labels	— CanEditLabels	Analyst SurveyCreator SurveyCreatorAdvanced Translator
— Can edit base language (dependent on permission to Can edit labels)	— CanEditBaseLanguage	Analyst SurveyCreator SurveyCreatorAdvanced
— Can manage context 4	— CanManageContext	Analyst SurveyCreatorAdvanced
— Can manage language 4	— CanManageLanguage	SurveyCreator SurveyCreatorAdvanced
— Can edit Question context 4	— CanEditQuestionContext	SurveyCreator SurveyCreatorAdvanced Translator

Display name	Internal name	Roles assigned to this activity or feature by default[1]
— Can edit Analysis context 4	— CanEditAnalysisContext	Analyst SurveyCreatorAdvanced Translator
Work with Questionnaire Routing		
— Can view routing 4	— CanViewRouting	Analyst ProjectManager SurveyCreator SurveyCreatorAdvanced SurveyReviewer
— Can edit routing structure 4 (dependent on permission to Can view routing)	— CanEditRoutingStructure	SurveyCreator SurveyCreatorAdvanced
— Can edit routing item 4 (dependent on permission to Can edit routing structure)	— CanEditRoutingItem	SurveyCreator SurveyCreatorAdvanced
— Can insert routing item 4 (dependent on permission to Can edit routing item)	— CanInsertRoutingItem	SurveyCreator SurveyCreatorAdvanced
— Can delete routing item 4 (dependent on permission to Can edit routing item)	— CanDeleteRoutingItem	SurveyCreator SurveyCreatorAdvanced
— Can edit script items 4 (dependent on permission to Can edit routing item)	— CanEditScriptItem	SurveyCreatorAdvanced
— Can insert script items 4 (dependent on permission to Can edit script item)	— CanInsertScriptItem	SurveyCreatorAdvanced
— Can delete script items 4 (dependent on permission to Can edit script item)	— CanDeleteScriptItem	SurveyCreatorAdvanced
— Can edit restricted script (dependent on permission to Can edit script item)	— CanEditRestrictedScript	
— Can insert a new routing (dependent on permission to Can edit routing structure)	— CanInsertRouting	SurveyCreator SurveyCreatorAdvanced
— Can delete routing (dependent on permission to Can edit routing structure)	— CanDeleteRouting	SurveyCreator SurveyCreatorAdvanced
Work with Standard Question Constructs		
— Can edit a question structure (for protected questions, is dependent on the permission to edit a protected question)	— CanEditQuestionStructure	SurveyCreator SurveyCreatorAdvanced
— Can insert a question 4 (dependent on permission to Can edit question structure)	— CanInsertQuestion	SurveyCreator SurveyCreatorAdvanced

Display name	Internal name	Roles assigned to this activity or feature by default[1]
— Can delete a question [4] (dependent on permission to Can edit question structure)	— CanDeleteQuestion	SurveyCreator SurveyCreatorAdvanced
— Can edit a shared list [4]	— CanEditSharedList	SurveyCreator SurveyCreatorAdvanced
— Can insert a shared list [4] (dependent on permission to Can edit shared list)	— CanInsertSharedList	SurveyCreator SurveyCreatorAdvanced
— Can delete a shared list [4] (dependent on permission to Can edit shared list)	— CanDeleteSharedList	SurveyCreator SurveyCreatorAdvanced
Database Questions		
— Can edit database question settings [4] (dependent on permission to Can edit question structure; for protected questions, is dependent on the permission to edit a protected question)	— CanEditDBSettings	SurveyCreatorAdvanced
Define Advanced Question Properties		
— Can view question properties	— CanViewQuestionProperties	Analyst ProjectManager SurveyCreator SurveyCreatorAdvanced SurveyReviewer
— Can edit question properties (dependent on permission to Can view question properties)	— CanEditQuestionProperties	SurveyCreator SurveyCreatorAdvanced
— Can view advanced properties	— CanViewAdvancedProperties	Analyst ProjectManager SurveyCreator SurveyCreatorAdvanced SurveyReviewer
— Can edit advanced properties (dependent on permission to Can view advanced properties)	— CanEditAdvancedProperties	SurveyCreator SurveyCreatorAdvanced
— Can view custom properties	— CanViewCustomProperties	Analyst ProjectManager SurveyCreatorAdvanced SurveyReviewer
— Can edit custom properties (dependent on permission to Can view custom properties)	— CanEditCustomProperties	SurveyCreatorAdvanced
— Can edit translator notes [4]	— CanEditTranslatorNotes	Analyst SurveyCreator SurveyCreatorAdvanced Translator

Display name	**Internal name**	**Roles assigned to this activity or feature by default**[1]
Work with Repository/C&DS		
— Can set up connection to repository	— CanSetUpRepositoryConnection	SurveyCreator SurveyCreatorAdvanced
Work with Library		
— Can insert from library [4]	— CanInsertFromLibrary	SurveyCreator SurveyCreatorAdvanced
Tools		
— Can deploy a project locally [4]	— CanDeployProjectLocally	SurveyCreatorAdvanced
— Can run Auto Answer [4]	— CanRunAutoAnswer	Analyst ProjectManager SurveyCreator SurveyCreatorAdvanced
Work with Templates		
— Can apply project templates [4]	— CanApplyProjectTemplates	SurveyCreator SurveyCreatorAdvanced
Protected Questions		
— Can edit protected questions	— CanEditProtectedQuestions	SurveyCreatorAdvanced
Build	InterviewBuilder	
— Allow activating from activity	— canActivate	
Delete	BackupAndRestore	TabulationFullAccess TabulationMediumAccess
— Allow delete project	— canDeleteProjects	TabulationFullAccess TabulationMediumAccess
Dialer Administration	DialerAdmin	CATISupervisor
Email	SampleEmailManager	CATISupervisor
Export Data	InterviewExporter	CATISupervisor TabulationFullAccess
— Can alter data link connection properties	canAlterConnectionProperties	CATISupervisor ProjectManager SurveyCreatorAdvanced TabulationFullAccess
Files	ManageFiles	TabulationFullAccess TabulationMediumAccess
Interviewer Monitoring	CatiMonitoring	CATISupervisor
— Can set up supervisor stations	— canSetupSupervisorStations	CATISupervisor
Interviewer Server Administration	Launcher	CATISupervisor CATIInterviewer TabulationFullAccess TabulationMediumAccess TabulationMinimumAccess
— Allow unlock project	— canUnlockProject	TabulationFullAccess TabulationMediumAccess
— Allow user download accessories	— canDownloadAccessories	

Display name	Internal name	Roles assigned to this activity or feature by default[1]
— Allow user to manage folders	— canManageProjectFolders	
— No choice, no action	— hasNoChoiceNoAction	CATISupervisor
Interviewing Activity Report	SessionEngineReports	
Launch	WebActivate	CATISupervisor
— Allow access via Interviewer Server Administration	— canViewInLauncher	
— Allow upload/edit sample script	— canEditSampleScript	
Manage Logs	managelogs	
Participant Rules	SampleManEditor	
Participants	SampleUpload	CATISupervisor
— Can advanced edit participants	— canAdvancedEditSample	
— Can create databases	— canCreateDatabase	
— Can delete participants[3]	— canDeleteSample	
— Can download participants	— canDownload	CATISupervisor
— Can edit participants	— canEditSample	CATISupervisor
— Can upload participants	— canUpload	CATISupervisor SurveyCreatorAdvanced SampleManager SurveyLauncher
— Can view participants	— canViewSample	CATISupervisor
— Can view summary	— canViewSummary	CATISupervisor
Phone	CatiReports	CATISupervisor
— Can display charts	— canDisplayCharts	
— Can view all interviewers' data	— canViewAllInterviewersData	CATISupervisor
Phone Participants	CatiInterview	CATISupervisor CATIInterviewer
— Can set up interviewer stations	— canSetUpInterviewerStations	CATISupervisor CATIInterviewer
Phone Surveys	CatiSupervisor	CATISupervisor
— Can delete call outcomes	— canDeleteCallOutcomes	CATISupervisor
— Can edit appointment settings	— canEditAppointment	CATISupervisor
— Can edit call outcomes	— canEditCallOutcomes	CATISupervisor
— Can edit call times	— canEditTimes	CATISupervisor
— Can edit dialer settings	— canEditOtherSettings	CATISupervisor
— Can edit fields	— canEditFields	CATISupervisor
— Can edit interview settings	— canEditInterviewerSettings	CATISupervisor
— Can edit ordering	— canEditOrdering	CATISupervisor
— Can edit overrides	— canEditOverrides	CATISupervisor

Display name	**Internal name**	**Roles assigned to this activity or feature by default**[1]
— Can edit parameters	— canEditParameters	CATISupervisor
— Can save appointment schedule	— canSaveAppointmentSchedule	CATISupervisor
— Can save day parts	— canSaveDayParts	CATISupervisor
— Can view appointment settings	— canViewAppointment	CATISupervisor
— Can view call outcomes	— canViewCallOutcomes	CATISupervisor
— Can view call times	— canViewTimes	CATISupervisor
— Can view dialer settings	— canViewOtherSettings	CATISupervisor
— Can view fields	— canViewFields	CATISupervisor
— Can view interview settings	— canViewInterviewerSettings	CATISupervisor
— Can view ordering	— canViewOrdering	CATISupervisor
— Can view overrides	— canViewOverrides	CATISupervisor
— Can view parameters	— canViewParameters	CATISupervisor
Project Editor	ProjectEditor	TabulationFullAccess TabulationMediumAccess
— Allow changing the project state	— canSetProjectState	TabulationFullAccess TabulationMediumAccess
— Allow creating new projects	— canCreateProjects	TabulationFullAccess TabulationMediumAccess
— Allow modifying properties	— canAlterProperties	TabulationFullAccess TabulationMediumAccess
Promote Project	WebSiteToSiteActivate	
Quotas	ReviewQuotas	CATISupervisor
— Allow editing quota prioritization	— canEditPrioritization	
— Allow editing quota targets	— canEditTargets	CATISupervisor
— Allow editing quota targets, completes, and prioritization	— canEditAll	CATISupervisor
Remote Administrator	RemoteManager	
Review Interviews	ReviewInterview	CATISupervisor
— Can set up supervisor stations	— canSetupSupervisorStations	
Status	ReviewProject	CATISupervisor
Survey Reporter Server Edition	Reporter	TabulationFullAccess TabulationMediumAccess TabulationMinimumAccess
— Can display charts	— canDisplayCharts	
— Can manage shared	— canManageShared	TabulationFullAccess TabulationMediumAccess
— Has full access	— FullAccess	TabulationFullAccess
— Has medium access	— MediumAccess	TabulationMediumAccess
— Has minimum access	— MinimumAccess	TabulationMinimumAccess

Display name	Internal name	Roles assigned to this activity or feature by default[1]
Survey Results	InterviewReporter	CATISupervisor
Survey Tabulation	mrTables	TabulationFullAccess TabulationMediumAccess TabulationMinimumAccess
— Can display charts	— canDisplayCharts	
— Can manage shared	— canManageShared	TabulationFullAccess TabulationMediumAccess
— Has full access	— FullAccess	TabulationFullAccess
— Has medium access	— MediumAccess	TabulationMediumAccess
— Has minimum access	— MinimumAccess	TabulationMinimumAccess
User Administration	UserAdministration	CATISupervisor
— Can add role	— canAddRole	
— Can add user	— canAddUser	CATISupervisor
— Can assign activity	— canAssignActivity	CATISupervisor
— Can assign project	— canAssignProject	CATISupervisor
— Can assign role	— canAssignRole	CATISupervisor
— Can create customer account	— canCreateCustomerAccount	
— Can edit customer account	— canEditCustomerAccount	
— Can remove customer account	— canRemoveCustomerAccount	
— Can remove role	— canRemoveRole	
— Can remove user	— canRemoveUser	CATISupervisor
— Can unassign activity	— canUnassignActivity	CATISupervisor
— Can unassign project	— canUnassignProject	CATISupervisor
— Can unassign role	— canUnassignRole	CATISupervisor
View Survey Link	TestInterview	CATISupervisor

[1] By default, the DPMAdmins and CustomerAccountAdmins roles are assigned to all activities and features.

[2] Users who are assigned to this activity can create local deployment packages even when they have read-only access to the source files (do not have authority to save the source files). In these cases, the source files will not be affected, but a local deployment package will be created.

[3] Deleting participants from telephone interviewing projects can cause phone reports to show unexpected results. If a user or role is assigned to telephone interviewing projects, do not assign that user or role to the “Can Delete Participants” feature.

[4] These features are new as of IBM® SPSS® Data Collection 6 Patch 1.

New Activity/Feature migration behavior

New roles were added in IBM® SPSS® Data Collection 6.0.1 Patch 1. As a result, the roles have been grouped in Interviewer Server Administration based on their function. The migration behavior of these new roles is as follows:

- For split features, the deprecated feature is replaced with the new corresponding features. The following features have been split:
  - *Can activate project* is replaced with the *Can activate in test mode*, *Can activate in go-live mode*, *Can view advanced activation settings*, and *Can edit advanced activation settings* features.
  - *Can manage context and language* is replaced with the *Can manage context* and *Can manage language* features.
  - *Can insert/edit script items* is replaced with the *Can edit script item*, *Can insert script item*, and *Can delete script item* features.
- For new features, a Interviewer Server Administration administrator will need to manually add the features to the appropriate roles.
- Users or roles who have access to IBM® SPSS® Data Collection Author will be automatically granted the newly added features; users or roles who have access to the *Can Manage Context And Language* or *Can Activate Project* features will be automatically granted the associated split features.
- Some of the new features are not intended for every user or role. You can manually remove any unneeded permissions by utilizing the provided *InitializeRoleBase.mrs* script. The script allows you to batch add or remove the feature permissions for existing users and roles. The script is located at: *[INSTALL_FOLDER]\IBM\SPSS\DataCollection\6\Interviewer Server Administration\RoleBasedAccess*. There are two files in the *RoleBasedAccess* directory:
  - **InitializeRoleBase.mrs** - Run this script to add or remove feature permissions for users and roles defined in the *InitializeRoleBase.xls* file. Before you run the script, you will will need to specify the ExcelFilePath parameter in the script.
  - **InitializeRoleBase.xls** - Identifies the feature permissions to add or remove for existing users or roles. For example:

Activity	Feature	Roles	Action
Author		SampleManager;SurveyLauncher	Remove
Author	CanManageContext	SurveyCreator;Translator;ProjectManager	Remove
Author	CanManageLanguage	Translator;Analyst;ProjectManager	Remove

Activity - Identifies the activity.

Feature - Identifies the corresponding activity feature.

Roles - Specifies users or roles for the activity feature. Users and roles are separated via semicolons.

Action - Specifies whether to Add or Remove the defined activity features for the specified users and roles.

Configure the spreadsheet to define the custom access levels for any user-created users or roles.

Note: Running *InitializeRoleBase.mrs* with the predefined *InitializeRoleBase.xls* spreadsheet will restore the default activity feature permissions for the existing Data Collection roles.

For more information, see the topic Assigning users or roles to activity features on p. 113.

Entering a blank role specification for an existing activity or feature does not remove the role's permission to use those activities or features. This must be done manually using User Administration.

UserProperties

Property settings for each user. The worksheet should contain one column listing user names and then as many columns as there are role and property combinations to set. Each property column for a role refers to one property in one property group and contains an appropriate value for that property (for example, true/false for a boolean property or a list of categorical values for a categorical property). The first column contains values for Role1:PropertyGroup1:Property1; the second column contains values for Role1:PropertyGroup1:Property2, and so on. If a property does not apply to a user, leave that cell of the worksheet blank. For example:

UserName	**ProjMan:PGroup1:Prop1**	**ProjMan:PGroup1:Prop2**	**Scriptwriter:PGroup1:Prop1**	**Scriptwriter:PGroup1:Prop2**
benjamin	english;french;german	true		
jose	english;spanish		value1;value2	

If a user already has user properties set, the settings in the spreadsheet are added to the existing settings. If you want to change or delete settings you must do so manually.

GlobalFilters

Defines global filters for a user or role for a particular project. The worksheet must contain three columns called ProjectID, RoleOrUserNames, and Filter listing the filter to be applied for each user or role when working on a project. The ProjectID field must contain the project's uppercase ID, not it's name. By default, Interviewer Server Administration creates projects with the same name and ID, except that the ID is in upper case. User and role names in a list must be separated by semicolons. For example:

ProjectID	**UserOrRoleNames**	**Filter**
TRAVEL	ProjManEast;AnalysisEast	Region.ContainsAny({East})
TRAVEL	ProjManWest;AnalysisWest	Region.ContainsAny({West})

If a user who has a global filter is also a member of a role that has a different global filter, the filter at the user level overrides the role-level filter. The two filters are not combined.

The columns mentioned for each worksheet are the ones that the import process requires. You can include other columns for your own purposes if you wish, and the import process will ignore them. Note, also, that you must create any properties and property groups before you import users and roles as the import process cannot create any that do not exist.

For more information, see the topic Setting up global filters on p. 136.

Exporting users, roles, and permissions

When you have a lot of users and roles, checking who is a member of each role and which permissions and qualifications each user or role has can be quite difficult to do on-screen, so User Administration provides an export facility that writes this information out in spreadsheet form. The spreadsheet is called *UsersAndRoles.xls* and has the same format as the one that you create for importing users. For more information, see the topic Setting up the spreadsheet on p. 96.

- ▶ In the left tree, select the appropriate customer account. If you are not using customer accounts, select the System account.

- ▶ Select Export from the Files menu.

  This displays the Exporting message box while the file is being created, followed by a File Download dialog box which offers you the option of opening the spreadsheet or saving it on your computer.

- ▶ To open the file, click Open; to save the file, click Save and choose where you want to save the file (you may rename it at this point too if you wish).

- ▶ Click OK to close the Exporting box.

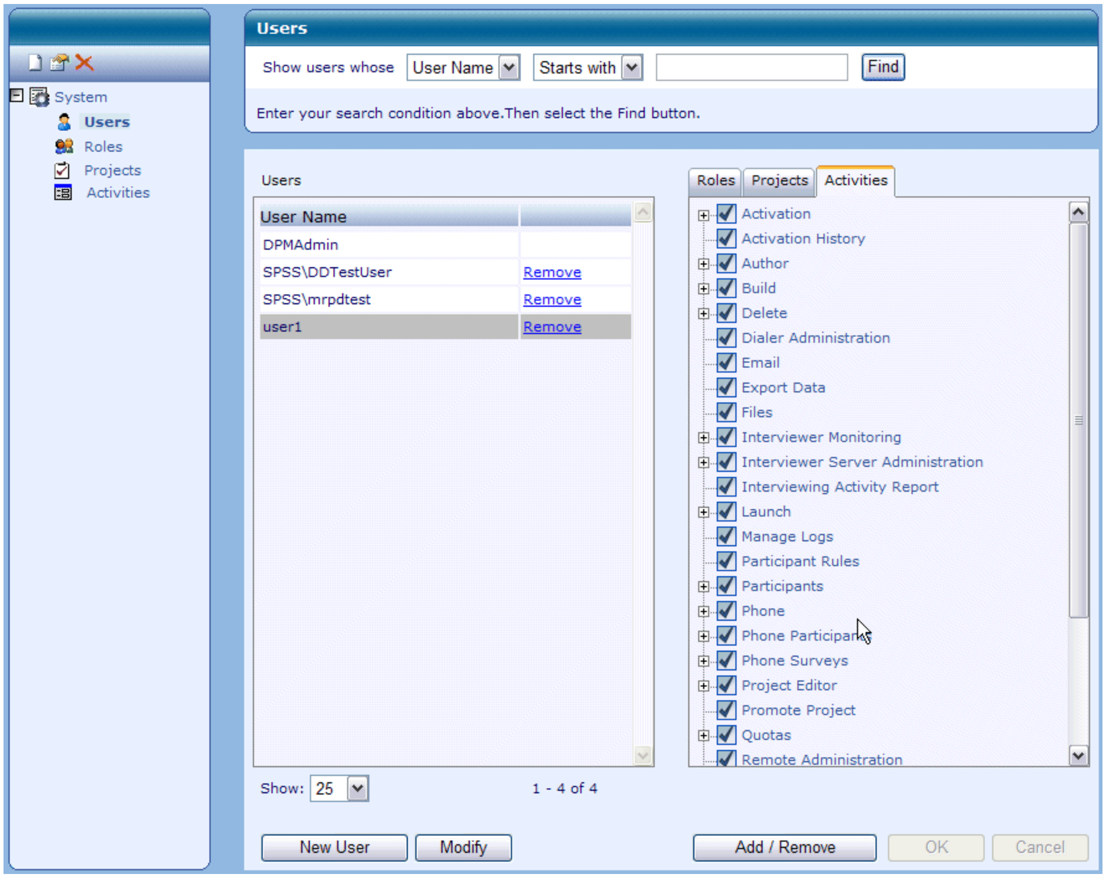
Assigning users or roles to activities

Do one of the following. Either:

- ▶ In the left tree, click Users (under the appropriate customer account) if you want to assign an individual user to an activity, or click Roles (under the appropriate customer account) if you want to assign all members of a role to an activity. If you are not using customer accounts, click Users or Roles under the System account.

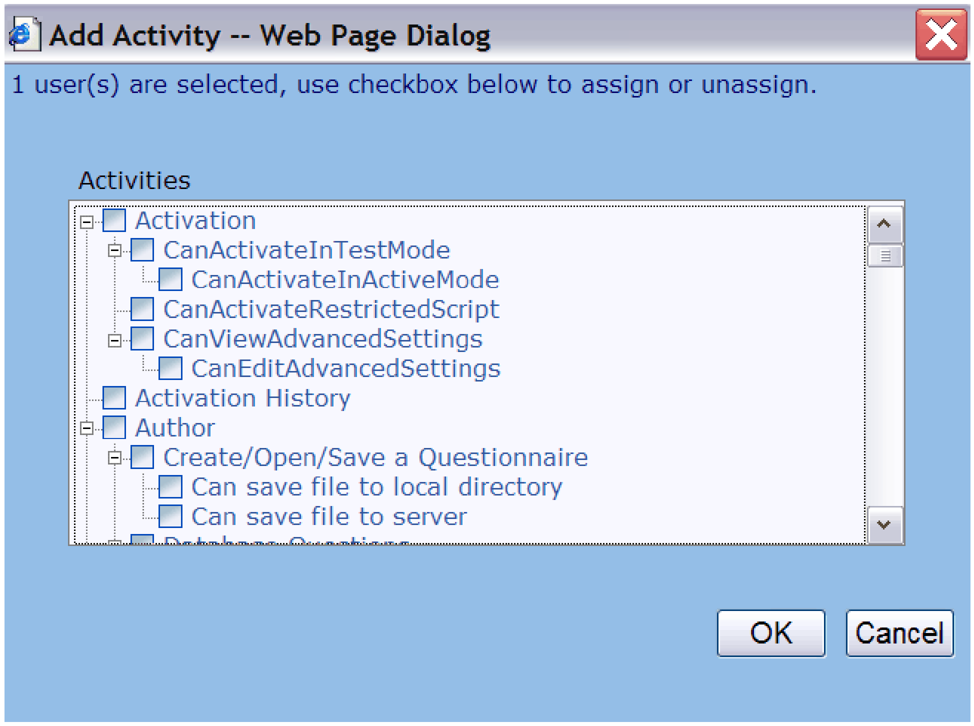
  A list of current user or role members appears on the right-hand side of the page.

- ▶ Select the users or roles, in the left table, to assign and select the Activities tab in the right table. This displays the activities, and activity features, to which this user or role is currently assigned.



- Click Add/Remove.

This opens the Add Activity dialog box.



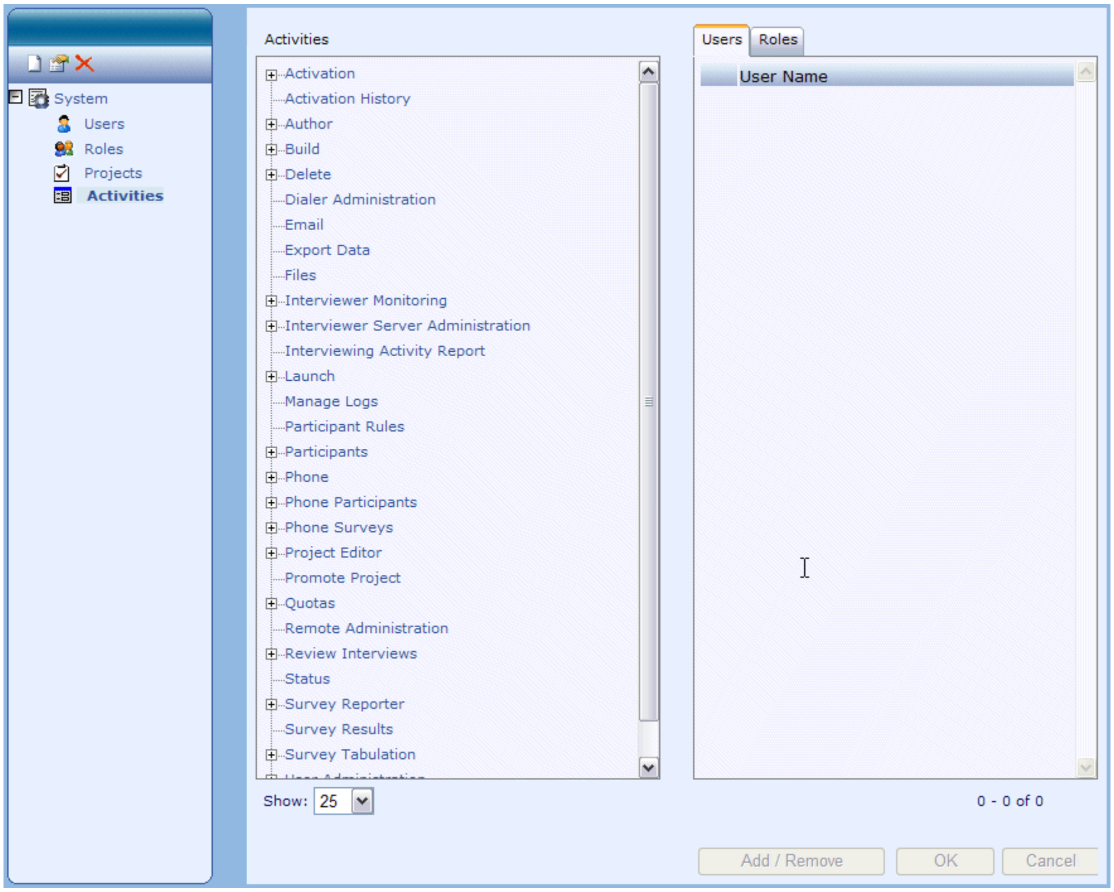
- ▶ Choose the activities to which this user or role should be assigned and click OK.

  Or:

- ▶ In the left tree , click Activities under the appropriate customer account. If you are not using customer accounts, click Activities under the System account.

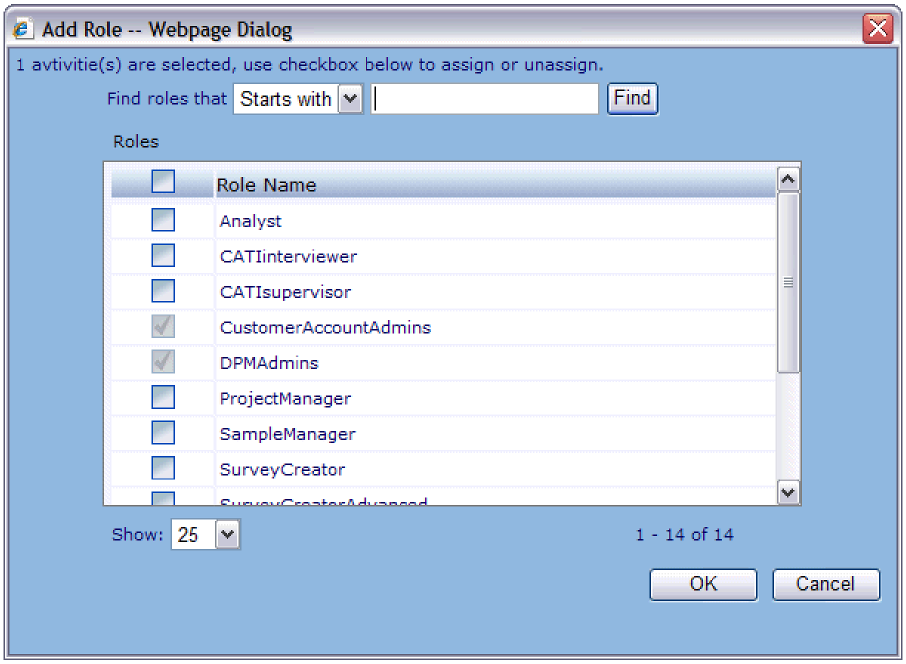
  The activities and activity features appears on the right-hand side of the page.

- ▶ Select the activities that you want to assign, then select the Users or Roles tab in the right table. This displays the users or roles to which the selected activities are currently assigned.



► Click Add/Remove.

This opens the Add User or Add Roles dialog box.



▶ Choose the users or roles you want to assign to this activity and click OK.

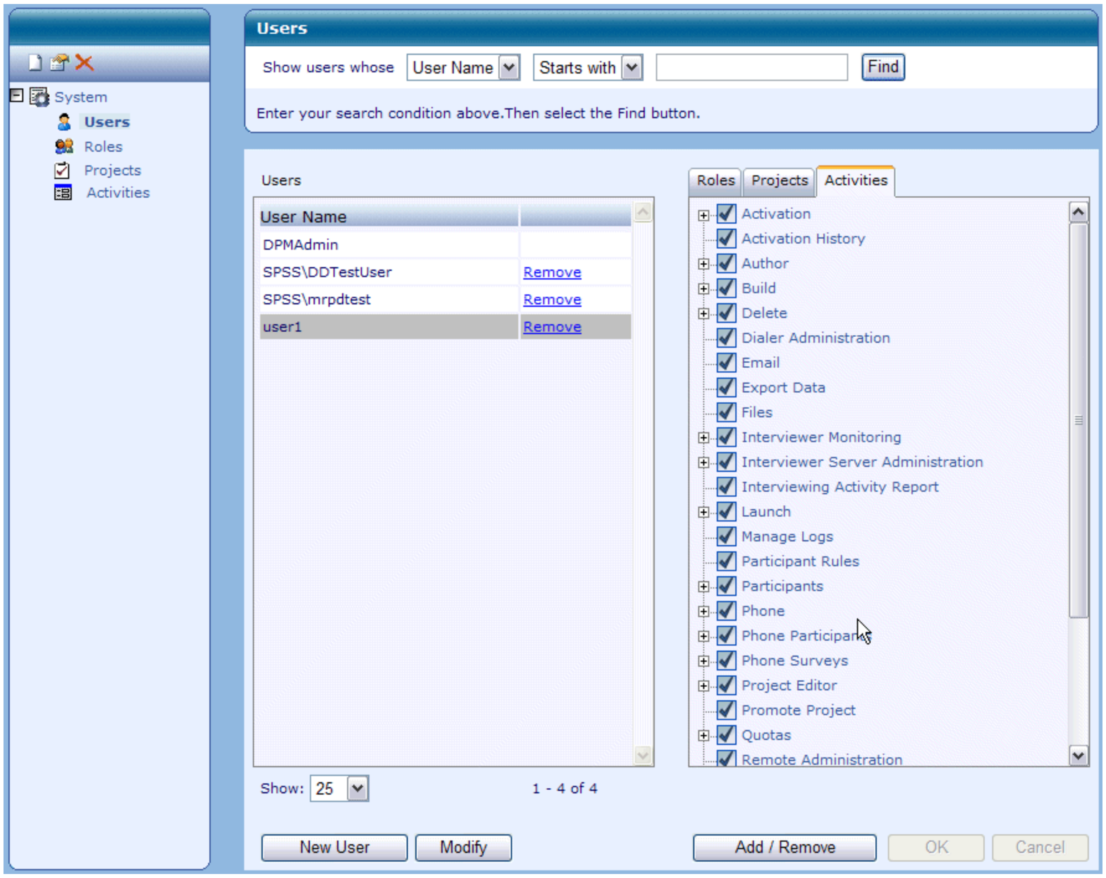
Unassigning users or roles from activities

Do one of the following. Either:

▶ In the left tree , click Users (under the appropriate customer account) if you want to unassign an individual user from an activity, or click Roles (under the appropriate customer account) if you want to unassign all members of a role from an activity. If you are not using customer accounts, click Users or Roles under the System account.

A list of current user or role members appears on the right-hand side of the page.

▶ Select the users or roles that you want to unassign, then select the Activities tab in the right table. This displays the activities and activity features to which this user or role is currently assigned.



- Deselect the activities you want to unassign and click OK.

  You can also click Add/Remove to open the Add Activity dialog box. Deselect the activities you want to unassign and click OK.

  Or:

- In the left tree , click Activities under the appropriate customer account. If you are not using customer accounts, click Activities under the System account.

  The activities and activity features appear on the right-hand side of the page.

- Select the activities that you want to unassign, then select the Users or Roles tab in the right table. This displays the users and roles to which the activities are currently assigned.

- Deselect the users or roles you want to unassign and click OK.

  You can also click Add/Remove to open the Add User or Add Role dialog box. Deselect the users or roles that you want to unassign and click OK.

Assigning users or roles to activity features

Activity features allow you to restrict access to key features within an activity to certain users only. For example, in Project Editor, you might want to restrict the ability to delete projects to project managers only. Each activity and activity feature has two names: the one by which it is known internally by Interviewer Server Administration and the one that is displayed. The following table shows the internal and display names of all the activity features you can set and the roles that are assigned to each feature by default:

Display name	Internal name	Roles assigned to this activity or feature by default[1]
Activation	Activation	
— Can activate in test mode [4]	CanActivateInTestMode	ProjectManager SampleManager SurveyCreator SurveyCreatorAdvanced SurveyLauncher
— Can activate in go-live mode [4] (dependent on permission to Can activate in test mode)	CanActivateInLiveMode	SampleManager SurveyCreatorAdvanced SurveyLauncher
— Can activate restricted script [4]	CanActivateRestrictedScript	
— Can edit advanced activation settings [4] (dependent on permission to Can view advanced activation settings)	CanEditAdvancedSettings	SampleManager SurveyCreatorAdvanced SurveyLauncher
— Can view advanced activation settings [4]	CanViewAdvancedSettings	ProjectManager SampleManager SurveyCreatorAdvanced SurveyLauncher
Activation History	ActivateReporter	
Author	Author	Analyst ProjectManager SampleManager SurveyCreator SurveyCreatorAdvanced SurveyLauncher Translator
Create/Open/Save Questionnaire		
— Can save questionnaire file to local directory	— CanSaveFileToLocalDirectory	SurveyCreator SurveyCreatorAdvanced
— Can save edited questionnaire file to server	— CanSaveFileToServer	Analyst SurveyCreator SurveyCreatorAdvanced Translator
Manage Languages and Contexts		

Display name	**Internal name**	**Roles assigned to this activity or feature by default**[1]
— Can edit labels	— CanEditLabels	Analyst SurveyCreator SurveyCreatorAdvanced Translator
— Can edit base language (dependent on permission to Can edit labels)	— CanEditBaseLanguage	Analyst SurveyCreator SurveyCreatorAdvanced
— Can manage context [4]	— CanManageContext	Analyst SurveyCreatorAdvanced
— Can manage language [4]	— CanManageLanguage	SurveyCreator SurveyCreatorAdvanced
— Can edit Question context [4]	— CanEditQuestionContext	SurveyCreator SurveyCreatorAdvanced Translator
— Can edit Analysis context [4]	— CanEditAnalysisContext	Analyst SurveyCreatorAdvanced Translator
Work with Questionnaire Routing		
— Can view routing [4]	— CanViewRouting	Analyst ProjectManager SurveyCreator SurveyCreatorAdvanced SurveyReviewer
— Can edit routing structure [4] (dependent on permission to Can view routing)	— CanEditRoutingStructure	SurveyCreator SurveyCreatorAdvanced
— Can edit routing item [4] (dependent on permission to Can edit routing structure)	— CanEditRoutingItem	SurveyCreator SurveyCreatorAdvanced
— Can insert routing item [4] (dependent on permission to Can edit routing item)	— CanInsertRoutingItem	SurveyCreator SurveyCreatorAdvanced
— Can delete routing item [4] (dependent on permission to Can edit routing item)	— CanDeleteRoutingItem	SurveyCreator SurveyCreatorAdvanced
— Can edit script items [4] (dependent on permission to Can edit routing item)	— CanEditScriptItem	SurveyCreatorAdvanced
— Can insert script items [4] (dependent on permission to Can edit script item)	— CanInsertScriptItem	SurveyCreatorAdvanced
— Can delete script items [4] (dependent on permission to Can edit script item)	— CanDeleteScriptItem	SurveyCreatorAdvanced
— Can edit restricted script (dependent on permission to Can edit script item)	— CanEditRestrictedScript	

Display name	Internal name	Roles assigned to this activity or feature by default[1]
— Can insert a new routing (dependent on permission to Can edit routing structure)	— CanInsertRouting	SurveyCreator SurveyCreatorAdvanced
— Can delete routing (dependent on permission to Can edit routing structure)	— CanDeleteRouting	SurveyCreator SurveyCreatorAdvanced
Work with Standard Question Constructs		
— Can edit a question structure (for protected questions, is dependent on the permission to edit a protected question)	— CanEditQuestionStructure	SurveyCreator SurveyCreatorAdvanced
— Can insert a question [4] (dependent on permission to Can edit question structure)	— CanInsertQuestion	SurveyCreator SurveyCreatorAdvanced
— Can delete a question [4] (dependent on permission to Can edit question structure)	— CanDeleteQuestion	SurveyCreator SurveyCreatorAdvanced
— Can edit a shared list [4]	— CanEditSharedList	SurveyCreator SurveyCreatorAdvanced
— Can insert a shared list [4] (dependent on permission to Can edit shared list)	— CanInsertSharedList	SurveyCreator SurveyCreatorAdvanced
— Can delete a shared list [4] (dependent on permission to Can edit shared list)	— CanDeleteSharedList	SurveyCreator SurveyCreatorAdvanced
Database Questions		
— Can edit database question settings [4] (dependent on permission to Can edit question structure; for protected questions, is dependent on the permission to edit a protected question)	— CanEditDBSettings	SurveyCreatorAdvanced
Define Advanced Question Properties		
— Can view question properties	— CanViewQuestionProperties	Analyst ProjectManager SurveyCreator SurveyCreatorAdvanced SurveyReviewer
— Can edit question properties (dependent on permission to Can view question properties)	— CanEditQuestionProperties	SurveyCreator SurveyCreatorAdvanced
— Can view advanced properties	— CanViewAdvancedProperties	Analyst ProjectManager SurveyCreator SurveyCreatorAdvanced SurveyReviewer

Display name	Internal name	Roles assigned to this activity or feature by default[1]
— Can edit advanced properties (dependent on permission to Can view advanced properties)	— CanEditAdvancedProperties	SurveyCreator SurveyCreatorAdvanced
— Can view custom properties	— CanViewCustomProperties	Analyst ProjectManager SurveyCreatorAdvanced SurveyReviewer
— Can edit custom properties (dependent on permission to Can view custom properties)	— CanEditCustomProperties	SurveyCreatorAdvanced
— Can edit translator notes [4]	— CanEditTranslatorNotes	Analyst SurveyCreator SurveyCreatorAdvanced Translator
Work with Repository/C&DS		
— Can set up connection to repository	— CanSetUpRepositoryConnection	SurveyCreator SurveyCreatorAdvanced
Work with Library		
— Can insert from library [4]	— CanInsertFromLibrary	SurveyCreator SurveyCreatorAdvanced
Tools		
— Can deploy a project locally [4]	— CanDeployProjectLocally	SurveyCreatorAdvanced
— Can run Auto Answer [4]	— CanRunAutoAnswer	Analyst ProjectManager SurveyCreator SurveyCreatorAdvanced
Work with Templates		
— Can apply project templates [4]	— CanApplyProjectTemplates	SurveyCreator SurveyCreatorAdvanced
Protected Questions		
— Can edit protected questions	— CanEditProtectedQuestions	SurveyCreatorAdvanced
Build	InterviewBuilder	
— Allow activating from activity	— canActivate	
Delete	BackupAndRestore	TabulationFullAccess TabulationMediumAccess
— Allow delete project	— canDeleteProjects	TabulationFullAccess TabulationMediumAccess
Dialer Administration	DialerAdmin	CATISupervisor
Email	SampleEmailManager	CATISupervisor
Export Data	InterviewExporter	CATISupervisor TabulationFullAccess

Display name	Internal name	Roles assigned to this activity or feature by default[1]
— Can alter data link connection properties	canAlterConnectionProperties	CATISupervisor ProjectManager SurveyCreatorAdvanced TabulationFullAccess
Files	ManageFiles	TabulationFullAccess TabulationMediumAccess
Interviewer Monitoring	CatiMonitoring	CATISupervisor
— Can set up supervisor stations	— canSetupSupervisorStations	CATISupervisor
Interviewer Server Administration	Launcher	CATISupervisor CATIInterviewer TabulationFullAccess TabulationMediumAccess TabulationMinimumAccess
— Allow unlock project	— canUnlockProject	TabulationFullAccess TabulationMediumAccess
— Allow user download accessories	— canDownloadAccessories	
— Allow user to manage folders	— canManageProjectFolders	
— No choice, no action	— hasNoChoiceNoAction	CATISupervisor
Interviewing Activity Report	SessionEngineReports	
Launch	WebActivate	CATISupervisor
— Allow access via Interviewer Server Administration	— canViewInLauncher	
— Allow upload/edit sample script	— canEditSampleScript	
Manage Logs	managelogs	
Participant Rules	SampleManEditor	
Participants	SampleUpload	CATISupervisor
— Can advanced edit participants	— canAdvancedEditSample	
— Can create databases	— canCreateDatabase	
— Can delete participants[3]	— canDeleteSample	
— Can download participants	— canDownload	CATISupervisor
— Can edit participants	— canEditSample	CATISupervisor
— Can upload participants	— canUpload	CATISupervisor SurveyCreatorAdvanced SampleManager SurveyLauncher
— Can view participants	— canViewSample	CATISupervisor
— Can view summary	— canViewSummary	CATISupervisor
Phone	CatiReports	CATISupervisor
— Can display charts	— canDisplayCharts	
— Can view all interviewers' data	— canViewAllInterviewersData	CATISupervisor

Display name	Internal name	Roles assigned to this activity or feature by default[1]
Phone Participants	CatiInterview	CATISupervisor CATIInterviewer
— Can set up interviewer stations	— canSetUpInterviewerStations	CATISupervisor CATIInterviewer
Phone Surveys	CatiSupervisor	CATISupervisor
— Can delete call outcomes	— canDeleteCallOutcomes	CATISupervisor
— Can edit appointment settings	— canEditAppointment	CATISupervisor
— Can edit call outcomes	— canEditCallOutcomes	CATISupervisor
— Can edit call times	— canEditTimes	CATISupervisor
— Can edit dialer settings	— canEditOtherSettings	CATISupervisor
— Can edit fields	— canEditFields	CATISupervisor
— Can edit interview settings	— canEditInterviewerSettings	CATISupervisor
— Can edit ordering	— canEditOrdering	CATISupervisor
— Can edit overrides	— canEditOverrides	CATISupervisor
— Can edit parameters	— canEditParameters	CATISupervisor
— Can save appointment schedule	— canSaveAppointmentSchedule	CATISupervisor
— Can save day parts	— canSaveDayParts	CATISupervisor
— Can view appointment settings	— canViewAppointment	CATISupervisor
— Can view call outcomes	— canViewCallOutcomes	CATISupervisor
— Can view call times	— canViewTimes	CATISupervisor
— Can view dialer settings	— canViewOtherSettings	CATISupervisor
— Can view fields	— canViewFields	CATISupervisor
— Can view interview settings	— canViewInterviewerSettings	CATISupervisor
— Can view ordering	— canViewOrdering	CATISupervisor
— Can view overrides	— canViewOverrides	CATISupervisor
— Can view parameters	— canViewParameters	CATISupervisor
Project Editor	ProjectEditor	TabulationFullAccess TabulationMediumAccess
— Allow changing the project state	— canSetProjectState	TabulationFullAccess TabulationMediumAccess
— Allow creating new projects	— canCreateProjects	TabulationFullAccess TabulationMediumAccess
— Allow modifying properties	— canAlterProperties	TabulationFullAccess TabulationMediumAccess
Promote Project	WebSiteToSiteActivate	
Quotas	ReviewQuotas	CATISupervisor
— Allow editing quota prioritization	— canEditPrioritization	
— Allow editing quota targets	— canEditTargets	CATISupervisor

Display name	Internal name	Roles assigned to this activity or feature by default[1]
— Allow editing quota targets, completes, and prioritization	— canEditAll	CATISupervisor
Remote Administrator	RemoteManager	
Review Interviews	ReviewInterview	CATISupervisor
— Can set up supervisor stations	— canSetupSupervisorStations	
Status	ReviewProject	CATISupervisor
Survey Reporter Server Edition	Reporter	TabulationFullAccess TabulationMediumAccess TabulationMinimumAccess
— Can display charts	— canDisplayCharts	
— Can manage shared	— canManageShared	TabulationFullAccess TabulationMediumAccess
— Has full access	— FullAccess	TabulationFullAccess
— Has medium access	— MediumAccess	TabulationMediumAccess
— Has minimum access	— MinimumAccess	TabulationMinimumAccess
Survey Results	InterviewReporter	CATISupervisor
Survey Tabulation	mrTables	TabulationFullAccess TabulationMediumAccess TabulationMinimumAccess
— Can display charts	— canDisplayCharts	
— Can manage shared	— canManageShared	TabulationFullAccess TabulationMediumAccess
— Has full access	— FullAccess	TabulationFullAccess
— Has medium access	— MediumAccess	TabulationMediumAccess
— Has minimum access	— MinimumAccess	TabulationMinimumAccess
User Administration	UserAdministration	CATISupervisor
— Can add role	— canAddRole	
— Can add user	— canAddUser	CATISupervisor
— Can assign activity	— canAssignActivity	CATISupervisor
— Can assign project	— canAssignProject	CATISupervisor
— Can assign role	— canAssignRole	CATISupervisor
— Can create customer account	— canCreateCustomerAccount	
— Can edit customer account	— canEditCustomerAccount	
— Can remove customer account	— canRemoveCustomerAccount	
— Can remove role	— canRemoveRole	
— Can remove user	— canRemoveUser	CATISupervisor
— Can unassign activity	— canUnassignActivity	CATISupervisor
— Can unassign project	— canUnassignProject	CATISupervisor
— Can unassign role	— canUnassignRole	CATISupervisor
View Survey Link	TestInterview	CATISupervisor

[1] By default, the DPMAdmins and CustomerAccountAdmins roles are assigned to all activities and features.

[2] Users who are assigned to this activity can create local deployment packages even when they have read-only access to the source files (do not have authority to save the source files). In these cases, the source files will not be affected, but a local deployment package will be created.

[3] Deleting participants from telephone interviewing projects can cause phone reports to show unexpected results. If a user or role is assigned to telephone interviewing projects, do not assign that user or role to the “Can Delete Participants” feature.

[4] These features are new as of IBM® SPSS® Data Collection 6 Patch 1.

New Activity/Feature migration behavior

New roles were added in IBM® SPSS® Data Collection 6.0.1 Patch 1. As a result, the roles have been grouped in IBM® SPSS® Data Collection Interviewer Server Administration based on their function. The migration behavior of these new roles is as follows:

- For split features, the deprecated feature is replaced with the new corresponding features. The following features have been split:
  - *Can activate project* is replaced with the *Can activate in test mode*, *Can activate in go-live mode*, *Can view advanced activation settings*, and *Can edit advanced activation settings* features.
  - *Can manage context and language* is replaced with the *Can manage context* and *Can manage language* features.
  - *Can insert/edit script items* is replaced with the *Can edit script item*, *Can insert script item*, and *Can delete script item* features.
- For new features, a Interviewer Server Administration administrator will need to manually add the features to the appropriate roles.
- Users or roles who have access to IBM® SPSS® Data Collection Author will be automatically granted the newly added features; users or roles who have access to the *Can Manage Context And Language* or *Can Activate Project* features will be automatically granted the associated split features.
- Some of the new features are not intended for every user or role. You can manually remove any unneeded permissions by utilizing the provided *InitializeRoleBase.mrs* script. The script allows you to batch add or remove the feature permissions for existing users and roles. The script is located at: *[INSTALL_FOLDER]\IBM\SPSS\DataCollection\6\Interviewer Server Administration\RoleBasedAccess*. There are two files in the *RoleBasedAccess* directory:
  - **InitializeRoleBase.mrs** - Run this script to add or remove feature permissions for users and roles defined in the *InitializeRoleBase.xls* file. Before you run the script, you will will need to specify the ExcelFilePath parameter in the script.
  - **InitializeRoleBase.xls** - Identifies the feature permissions to add or remove for existing users or roles. For example:

Activity	Feature	Roles	Action
Author		SampleManager;SurveyLauncher	Remove

Activity	Feature	Roles	Action
Author	CanManageContext	SurveyCreator;Translator;ProjectManager	Remove
Author	CanManageLanguage	Translator;Analyst;ProjectManager	Remove

Activity - Identifies the activity.

Feature - Identifies the corresponding activity feature.

Roles - Specifies users or roles for the activity feature. Users and roles are separated via semicolons.

Action - Specifies whether to Add or Remove the defined activity features for the specified users and roles.

Configure the spreadsheet to define the custom access levels for any user-created users or roles.

Note: Running *InitializeRoleBase.mrs* with the predefined *InitializeRoleBase.xls* spreadsheet will restore the default activity feature permissions for the existing Data Collection roles.

For more information, see the topic Assigning users or roles to activity features on p. 113.

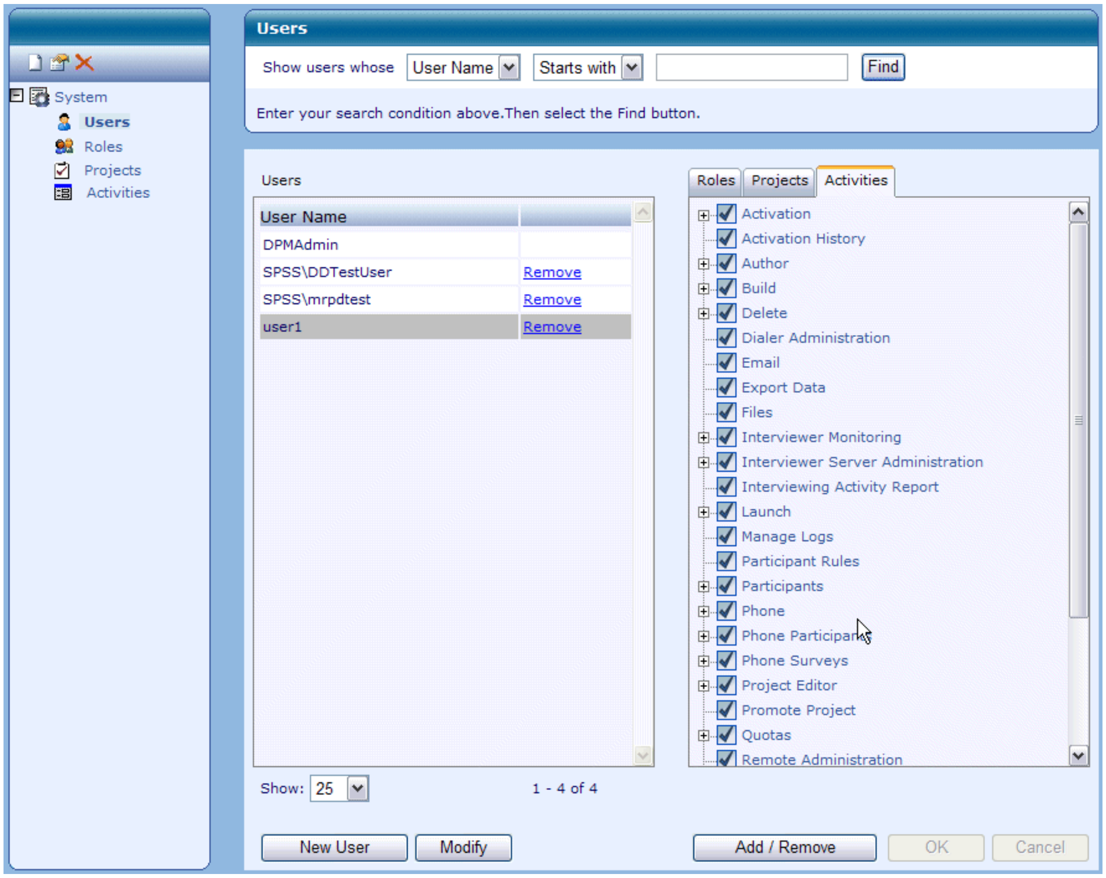
Assigning users or roles to features

Do one of the following. Either:

- ▶ In the left tree, click Users (under the appropriate customer account) to assign users to Features, or Roles (under the appropriate customer account) to assign all members of a role to Features. If you are not using customer accounts, click Users or Roles under the System account.

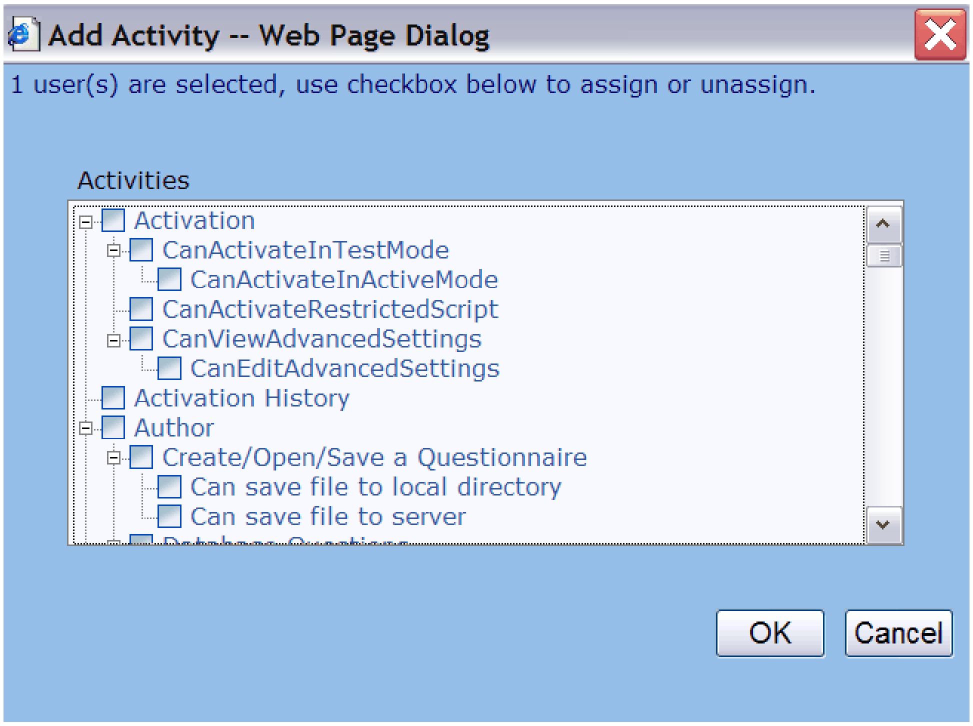
  A list of current user or role members appears on the right-hand side of the page.

- ▶ Select the users or roles that you want to assign, then select the Activities tab in the right table. This displays the activities and activity features to which this user or role is currently assigned.



▶ Click Add/Remove.

This opens the Add Activity dialog box.



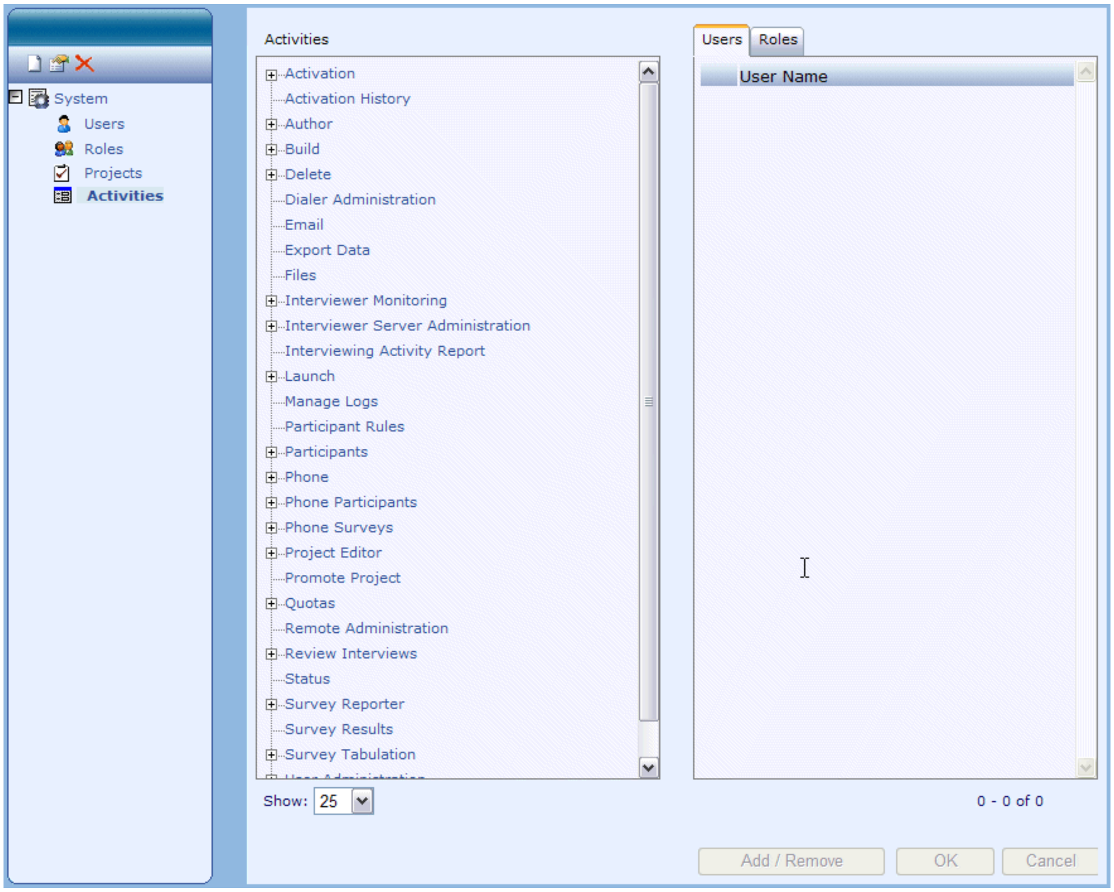
- Select the activity features to which this user or role should be assigned and click OK.

  Or:

- In the left tree , click Activities under the appropriate customer account. If you are not using customer accounts, click Activities under the System account.

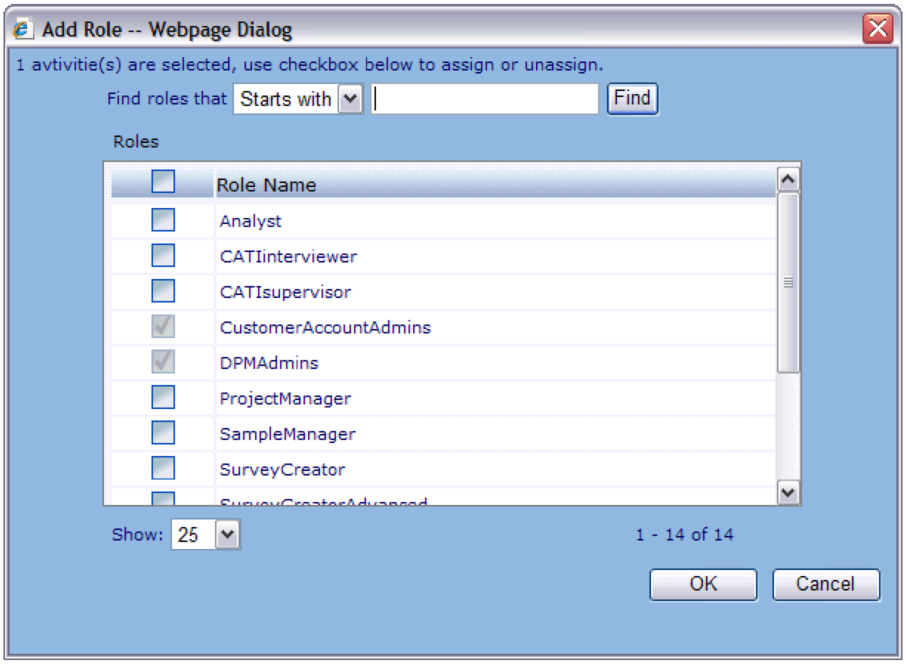
  The activities and activity features appear on the right-hand side of the page.

- Select the activities that you want to assign, then select the Users or Roles tab in the right table. This displays the users and roles to which the activities are currently assigned.



▶ Click Add/Remove.

This opens the Add User or Add Role dialog box.



▶ Select the users or roles you want to assign to the activity and click OK.

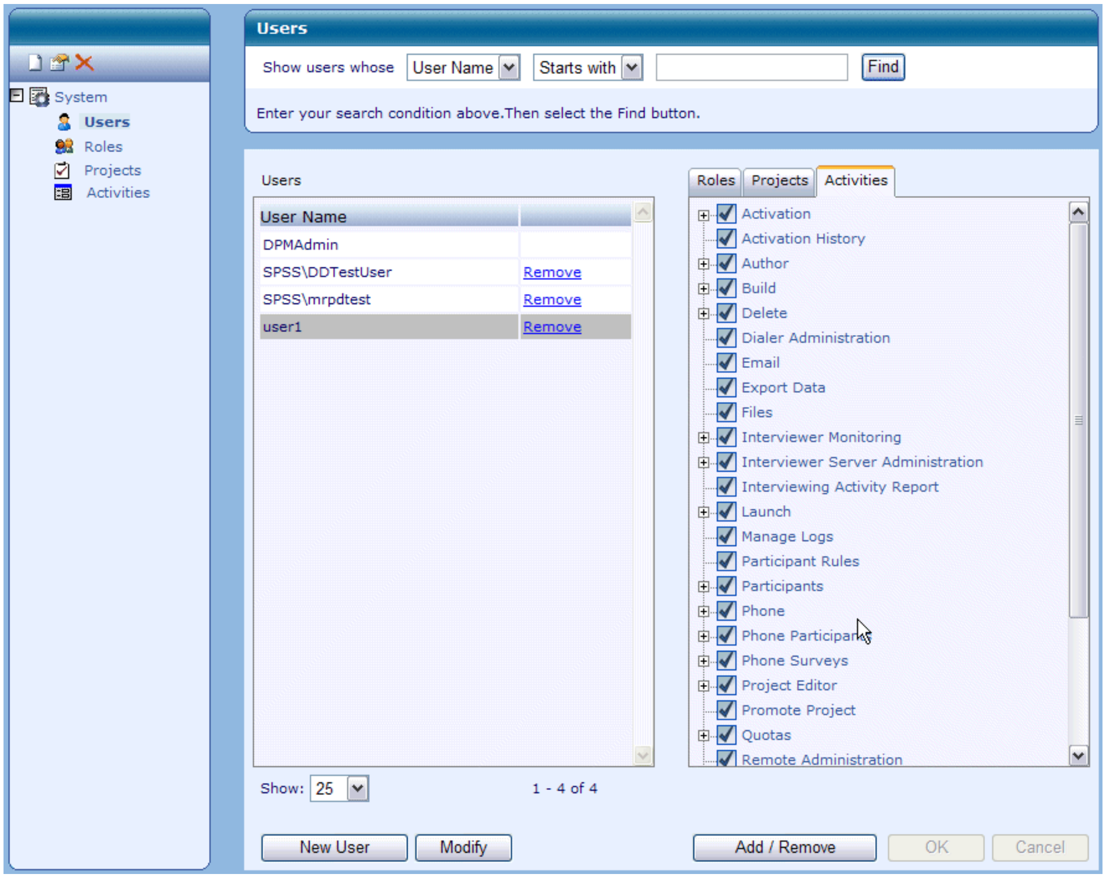
Removing users or roles from activity features

Do one of the following. Either:

▶ In the left tree, click Users (under the appropriate customer account) if you want to unassign an individual user from an activity feature, or click Roles (under the appropriate customer account) if you want to unassign all members of a role from an activity feature. If you are not using customer accounts, click Users or Roles under the System account.

A list of current user or role members appears on the right-hand side of the page.

▶ Select the users or roles that you want to unassign, then select the Activities tab in the right table. This displays the activities and activity features to which this user or role is currently assigned.



- Deselect the activity features that you want to unassign and click OK.

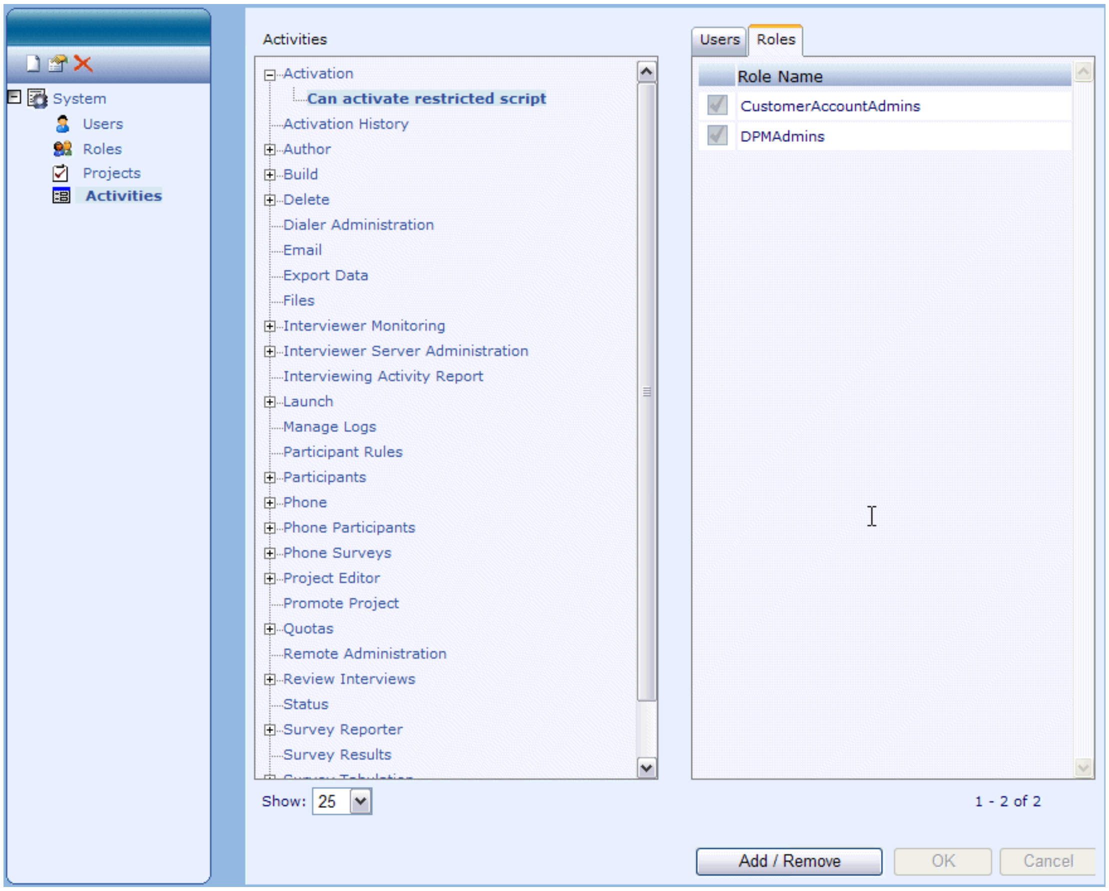
  You can also click Add/Remove to open the Add Activity dialog box. Deselect the activity features that you want to unassign and click OK.

  Or:

- In the left tree, click Activities.

  The tree activities and activity features appears on the right-hand side of the page.

- Select the activity feature that you want to unassign, then select the Users or Roles tab in the right table. This displays the users or roles to which the selected activity feature is currently assigned.



▶ Deselect the user or roles that you want to unassign and click OK.

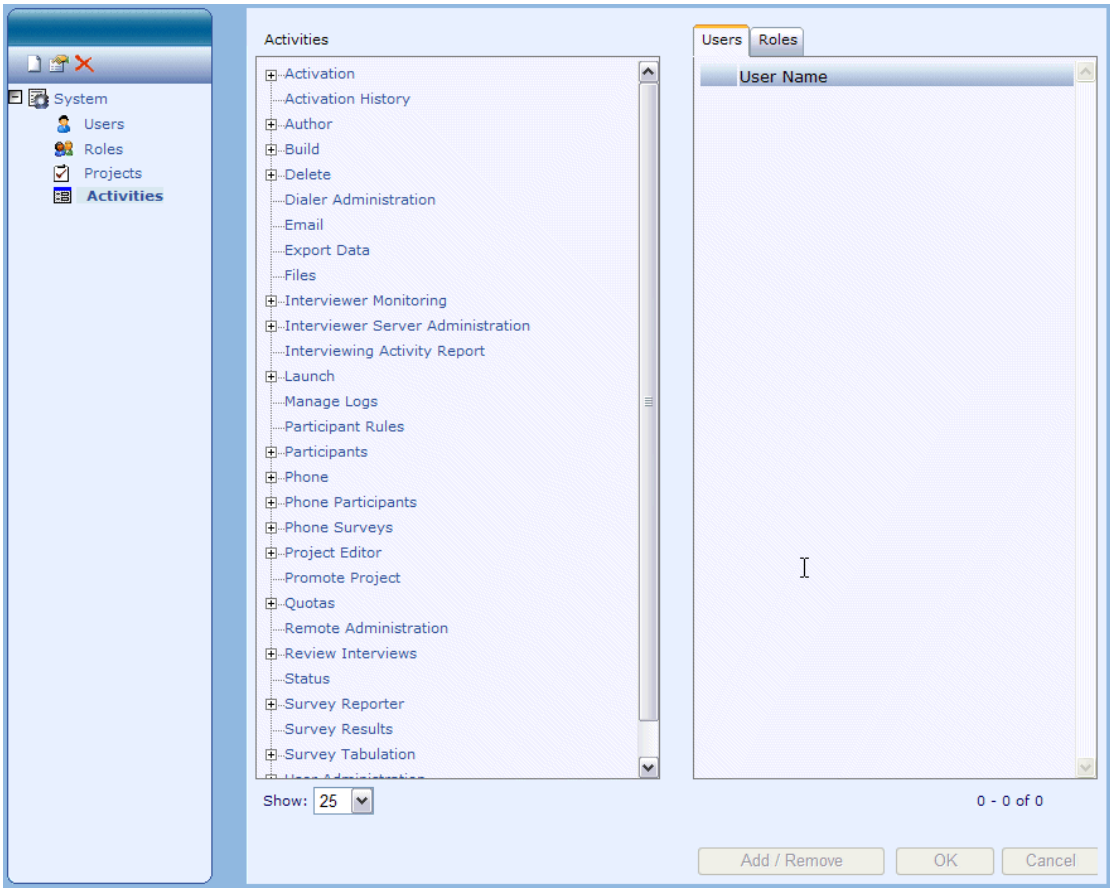
You can also click Add/Remove to open the Add User or Add Role dialog box. Deselect the users or roles that you want to unassign and click OK.

Assigning activities to a user or role

▶ In the left tree , click Activities under the appropriate customer account. If you are not using customer accounts, click Activities under the System account.

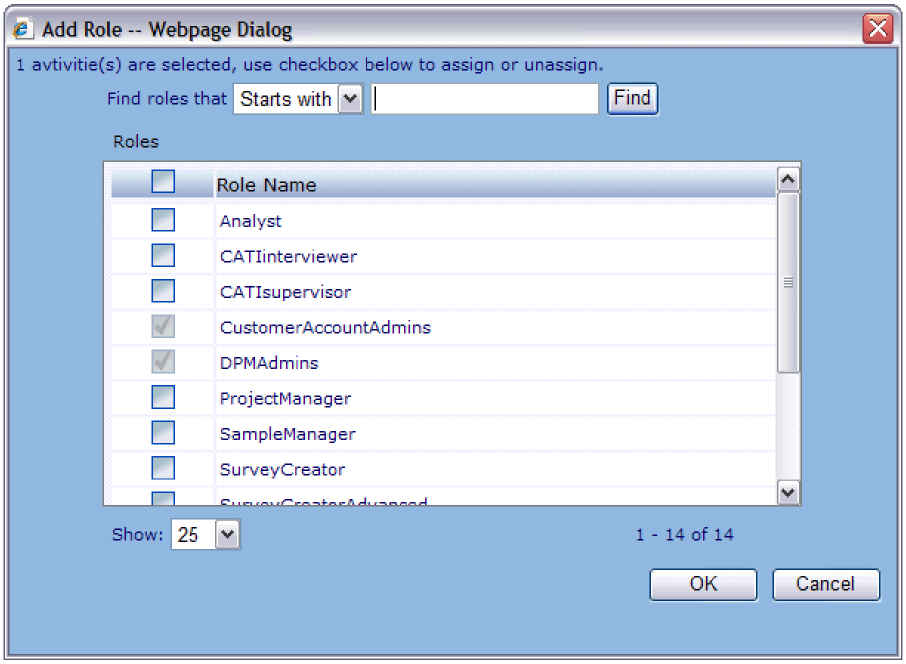
The activities and activity features appear on the right-hand side of the page.

▶ Select the activities that you want to assign, then select the Users or Roles tab in the right table. This displays the users and roles to which the activities are currently assigned.



► Click Add/Remove.

This opens the Add User or Add Role dialog box.



- Select the users or roles you want to assign to the activity and click OK.

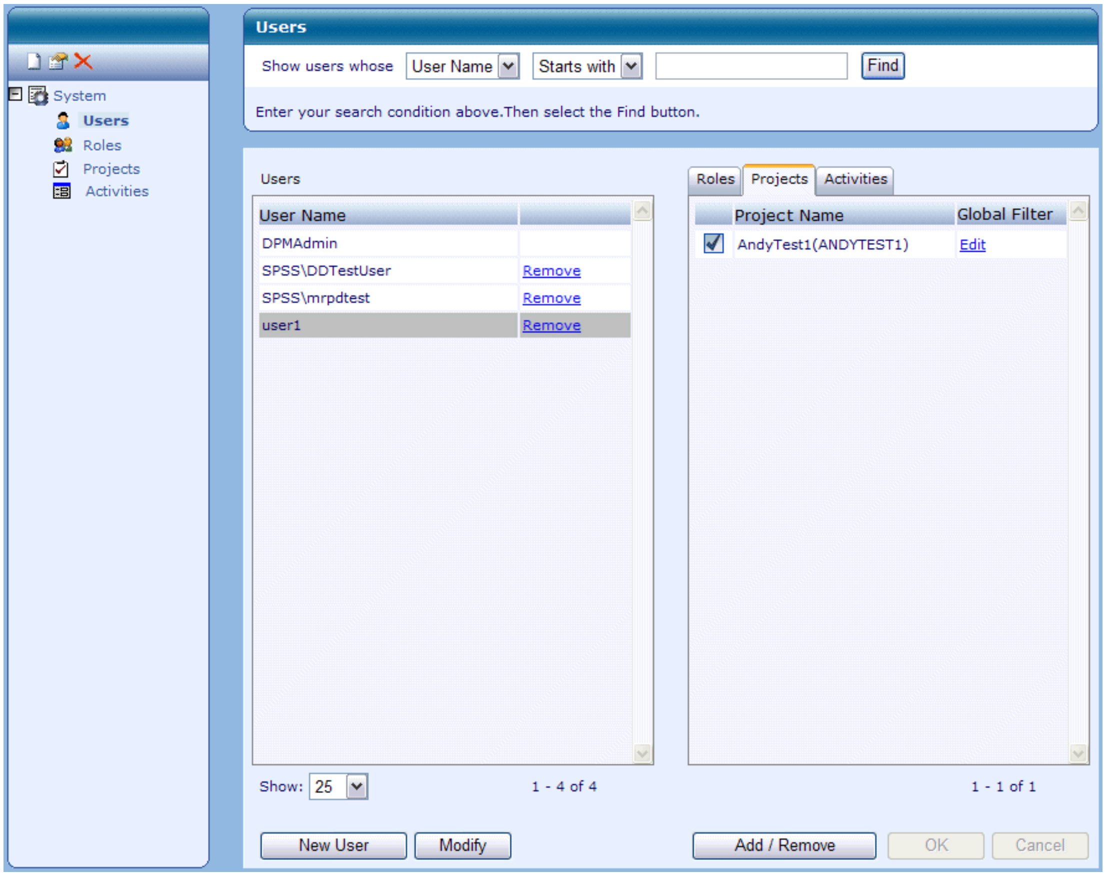
Assigning users or roles to a project

Do one of the following. Either:

- In the left tree, click Users (under the appropriate customer account) to assign users to a project, or Roles (under the appropriate customer account) to assign all members of a role to a project. If you are not using customer accounts, click Users or Roles under the System account.

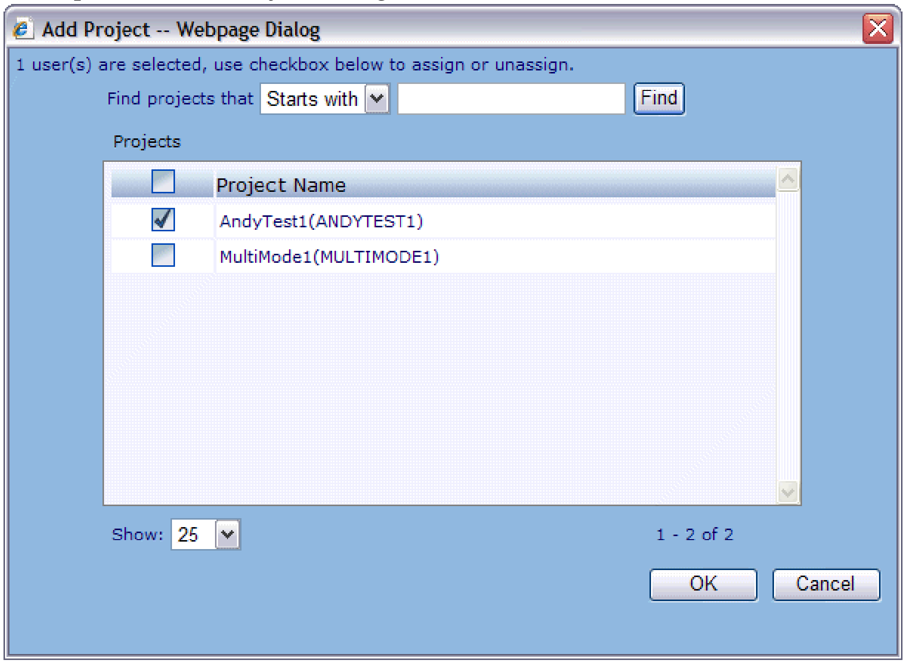
  A list of current user or role members appears on the right-hand side of the page.

- Select the users or roles that you want to assign, then select the Projects tab in the right table. This displays the projects to which this user or role is currently assigned.


Users
Show users whose
User Name
Starts with
Find
Enter your search condition above.Then select the Find button.
System
Users
Roles
Projects
Activities
Users
User Name
DPMAdmin
SPSS\DDTestUser
Remove
SPSS\mrpdtest
Remove
user1
Remove
Roles
Projects
Activities
Project Name
Global Filter
AndyTest1(ANDYTEST1)
Edit
Show: 25
1 - 4 of 4
1 - 1 of 1
New User
Modify
Add / Remove
OK
Cancel

▶ Click Add/Remove.

This opens the Add Project dialog box.



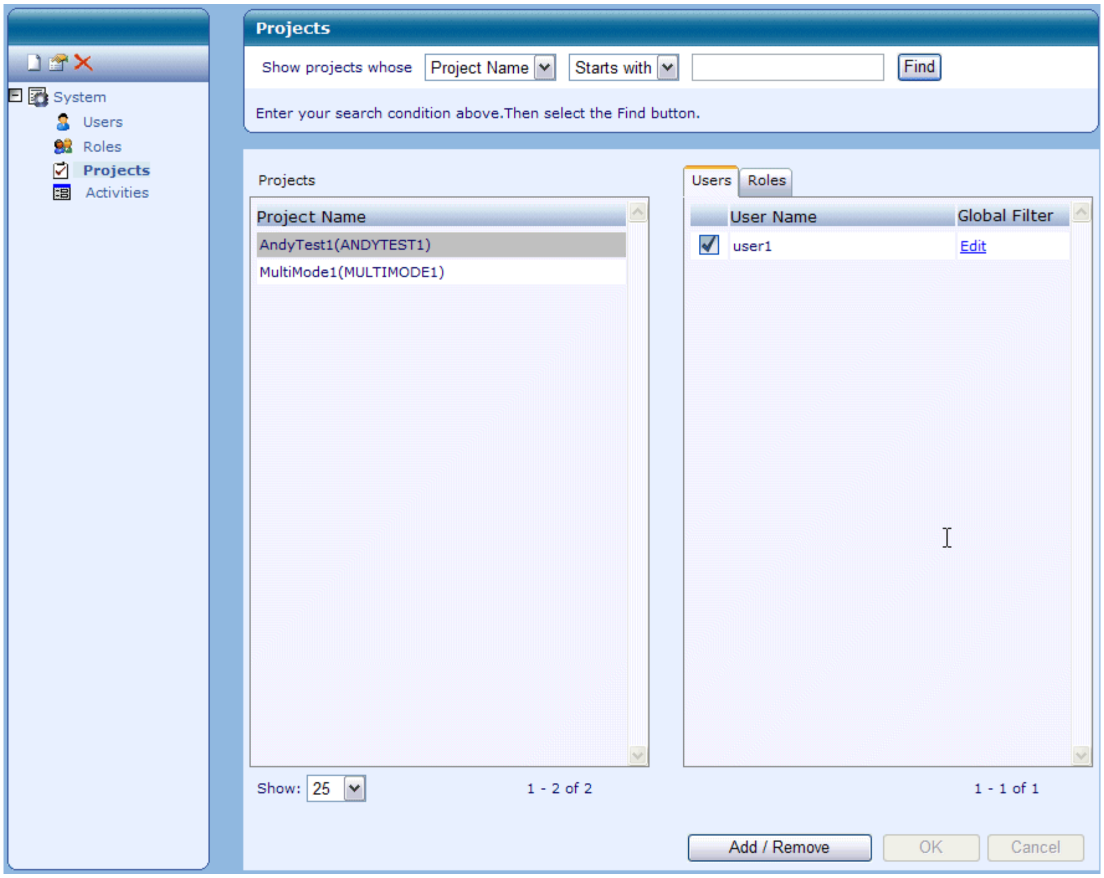
▶ Select the projects to which this user or role should be assigned and click OK.

Or:

▶ In the left tree, click Projects under the appropriate customer account. If you are not using customer accounts, click Projects under the System account.

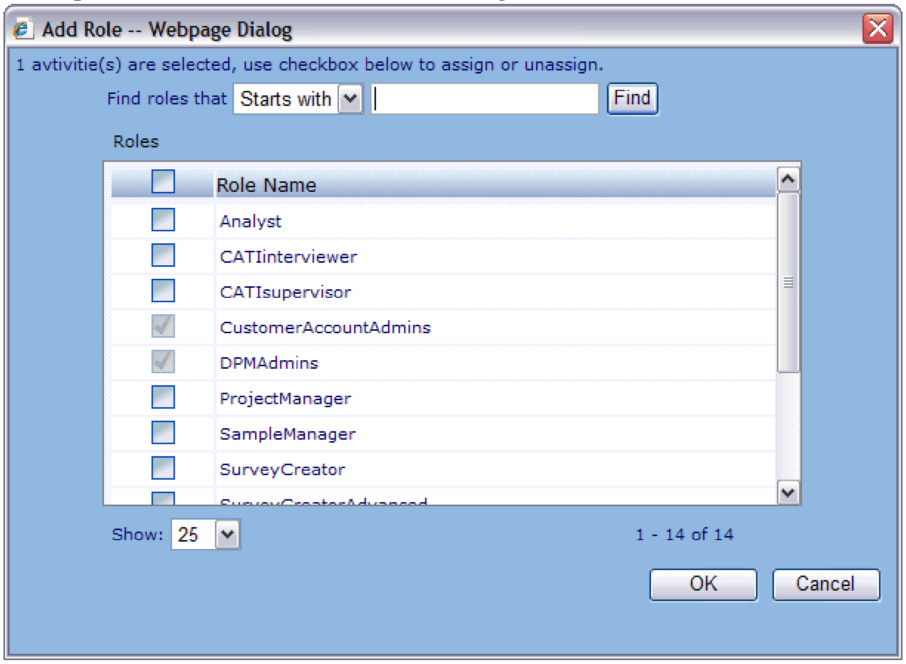
A list of current projects appears on the right-hand side of the page.

▶ Select the project that you want to assign, then select the Users or Roles tab in the right table. This displays the users or roles to which the selected project is currently assigned.


Projects
Show projects whose
Project Name
Starts with
Find
Enter your search condition above.Then select the Find button.
System
Users
Roles
Projects
Activities
Projects
Project Name
AndyTest1(ANDYTEST1)
MultiMode1(MULTIMODE1)
Users
Roles
User Name
Global Filter
user1
Edit
Show: 25
1 - 2 of 2
1 - 1 of 1
Add / Remove
OK
Cancel

- Click Add/Remove.

  This opens the Add User or Add Role dialog box.



- Select the users or roles to which this project should be assigned and click OK.

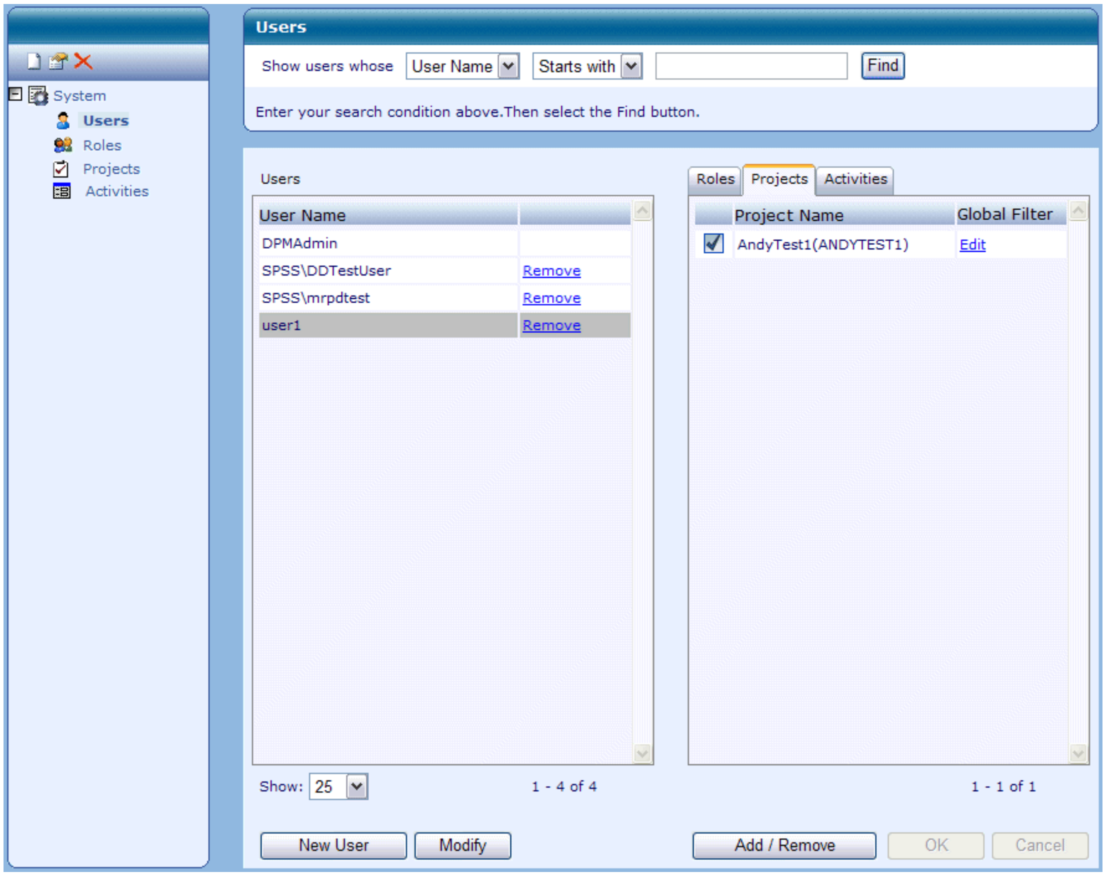
Unassigning users or roles from projects

Do one of the following. Either:

- In the left tree, click Users (under the appropriate customer account) to unassign users to a project, or Roles (under the appropriate customer account) to unassign all members of a role to a project. If you are not using customer accounts, click Users or Roles under the System account.

  A list of current user or role members appears on the right-hand side of the page.

- Select the users or roles that you want to unassign, then select the Projects tab in the right table. This displays the projects to which this user or role is currently assigned.



- Deselect the appropriate projects and click OK.

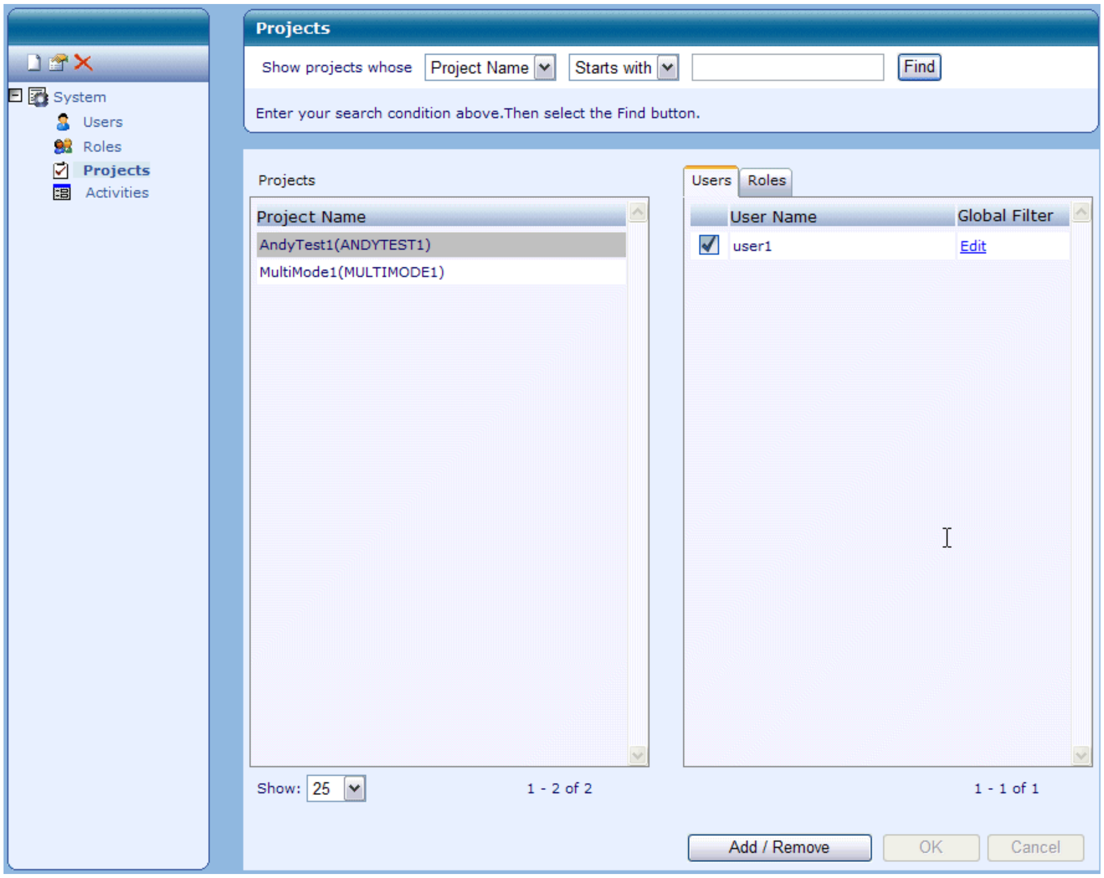
  You can also click Add/Remove to display the Add Project dialog box. Deselect the appropriate projects for the selected user or group, and click OK.

  Or:

- In the left tree, click Projects under the appropriate customer account. If you are not using customer accounts, click Projects under the System account.

  A list of current projects appears on the right-hand side of the page.

- Select the project that you want to unassign, then select the Users or Roles tab in the right table. This displays the users or roles to which the selected project is currently assigned.



▶ Deselect the appropriate users or roles and click OK.

You can also click Add/Remove to display the Add User or Add Role dialog box. Deselect the appropriate users or roles for the selected project, and click OK.

No Choice No Action

Every second is important in CATI interviewing, including the time it takes a user to login to the IBM® SPSS® Data Collection applications, select a project to work with, and then select the Phone Participants activity. While this wasted time may appear to be miniscule, every second lost has a measurable economic impact.

In order to minimize this impact, and maximize phone participants (as well as all users) efficiency, Data Collection has eliminated the need for users to take action (click) when there are no actionable projects or activities. When a user or role has access to only one project and one activity, and is assigned the *No Choice No Action* option, the user directly enters the project or activity after logging in. When the user logs off, the system logs the user out of Data Collection.

Assigning the No Choice No Action Feature

The *No Choice No Action* feature is listed under the IBM® SPSS® Data Collection Interviewer Server Administration activity. For more information, see the topic Assigning users or roles to activity features on p. 113.

Setting up global filters

Global filters are user-level or role-level filters that control access to case data in a project. For example, in a company that provides insurance services you may have roles associated with different types of insurance. The Household role may have a global filter that restricts group members to seeing data associated with household insurance such as building or contents insurance; the Personal role may have a global filter that selects only data associated with life and earnings protection insurance; and so on. Alternatively, you might decide to set up filters based on sales regions, so that members of the Eastern sales group can see details about all insurance types, but only for clients in their area.

For any user or role, you may set the same global filter for all projects or you may vary them between projects. Activities that use global filters include Survey Results, Export Data, and IBM® SPSS® Data Collection Survey Reporter.

If a user who has a global filter is also a member of a role that has a different global filter, the filter at the user level overrides the role-level filter. If a user is a member of two roles that have different filters for a project, the filters are combined so that he/she sees data selected by at least one of the filters.

Suppose you have the following users and roles:

- UserA belongs to Role1 and Role2
- UserB belongs to Role2 and Role3
- UserC belongs to Role2 and Role4

and you set up the following global filters:

Project Id	User name	Role name	Global filter
ProjectA	UserA		Region.ContainsAny({Eastern})
ProjectA		Role1	Region.ContainsAny({Western})
		Role2	Region.ContainsAny({Southern})
		Role3	Region.ContainsAny({Northern})
		Role4	NOT Region.ContainsAny({Northern})

When the users access the case data for project A, the following filters are applied:

- UserA: the filter is Region.ContainsAny({Eastern})
- UserB: the filter is Region.ContainsAny({Southern }) OR Region.ContainsAny({Northern})
- UserC: the filter is Region.ContainsAny({Southern }) OR (NOT Region.ContainsAny({Northern}))

Global filters are based on questions in the project's questionnaire script. In the first example, the case data would need to include a question that says what type of insurance the data refers to; in the second example, the case data would need a question that identifies the region in which

each respondent lives. The syntax for defining global filters varies slightly depending on the type of question you are filtering on.

Numeric questions

To filter on a numeric question, type:

```
QuestionName Operator Value
```

where:

- `QuestionName` is the name of a question in the project's questionnaire file.
- `Value` is a number.
- `Operator` is one of the following:

=	Equal to
<>	Unequal to
<	Less than
<=	Less than or equal to
>	Greater than
>=	Greater than or equal to

For example `Age>60` restricts the user/role to seeing data for respondents who are older than 60.

Text questions

To filter on a text question, type:

```
QuestionName Like "Pattern"
```

where:

- `QuestionName` is the name of a question in the project's questionnaire file.
- `Pattern` is the text with which the data is to be compared. An underscore in the text matches any single character, and a percent sign matches any number of characters, including zero.

For example, `Postcode Like "TN%"` allows the user/role to access all data for postal codes that start with the letters TN.

Categorical questions

To define filters for categorical questions (single choice or multiple choice responses), type one of the following:

```
QuestionName Operator Value
QuestionName.Function({Value})
```

where:

- `QuestionName` is the name of a question in the project's questionnaire file.
- `Value` is the name of a response in the question's response list. You may enter more than one response name as long as the names are separated by commas.

- `Operator` is one of the following.

=	Selects data that exactly matches the given value.
<>	Selects data does not exactly match the given value.
<	Selects data that contains a subset of the listed answers but not all of them.
<=	Selects data that contains one or more of the listed answers.
>	Selects data that contains all the listed answers and at least one other answer.
>=	Selects data that contains all specified answers, with or without additional answers.

- `Function` is one of the following:

ContainsAll	Selects data that contains all the specified answers.
ContainsAny	Selects data that contains at least one of the specified answers.

For example:

```
InsuranceType={Household}
```

gives access to data where the value of *InsuranceType* is Household and nothing else, whereas:

```
InsuranceType.ContainsAny({Household})
```

gives access to data where the value of *InsuranceType* is just Household or Household and some other type of insurance.

Note: `ContainsAny` and `ContainsAll` are the most commonly used functions for setting up filters, but you may use any function in the IBM® SPSS® Data Collection Function Library. If you are unable to set up the filters you want using the methods shown in this topic, refer to the "Data Collection Function Library" topic in the IBM® SPSS® Data Collection Developer Library documentation for details of further filtering keywords.

You can create filters that combine two or more criteria; for example, household insurance in the east. To do this, type the two filter expressions one after the other, separated with either "And" or "Or":

And	Both expressions must be true in order for the user/role to see the data.
Or	One or both expressions must be true in order for the user/role to see the data.

The filter for household insurance in the east might be:

```
InsuranceType.ContainsAny({Household}) And Region={East}
```

Compare this with:

```
InsuranceType.ContainsAny({Household} Or Region={East}
```

which gives access to all household data for the eastern region, but also to all data about household insurance in any region and all data about any type of insurance in the eastern region.

Setting up global filters

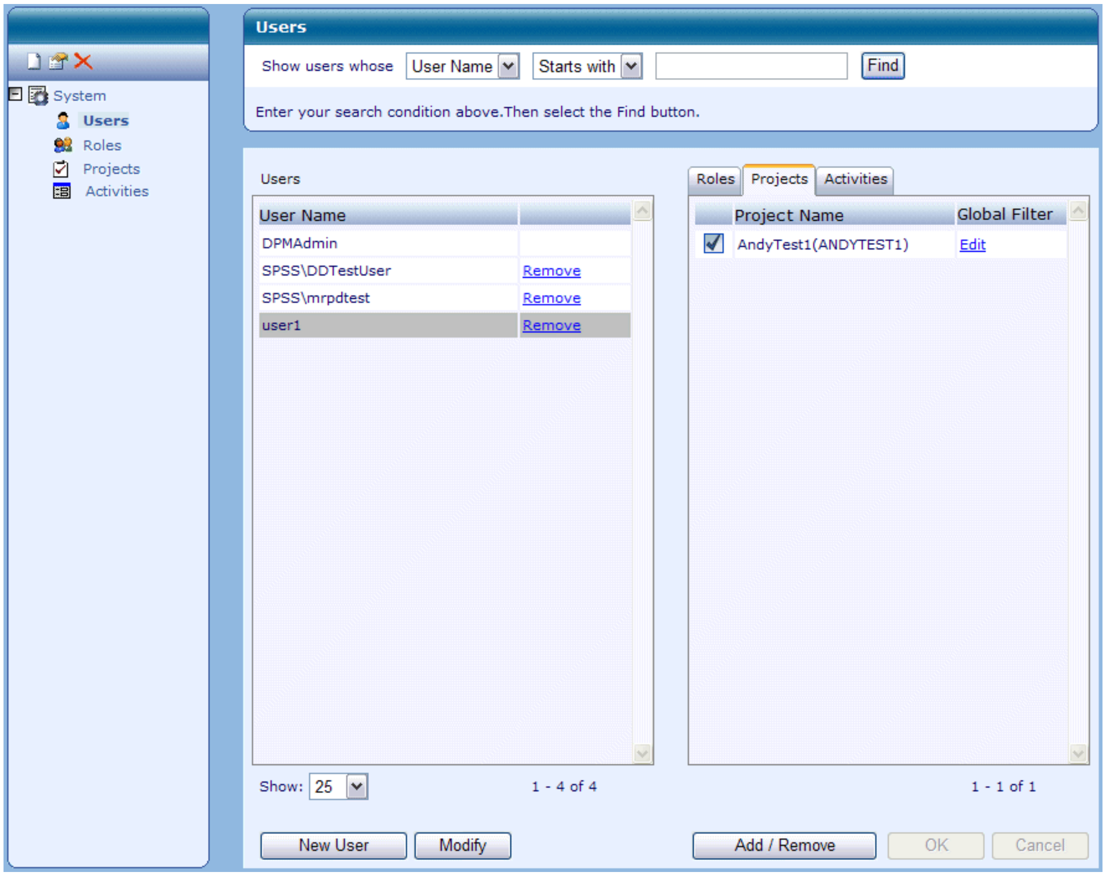
- Launch the User Administration activity from the Tools menu.
- In the left tree, click the Users, Roles, or Projects (under the appropriate customer account) for which you want to define a global filter. If you are not using customer accounts, click Users, Roles, or Projects under the System account. There are various ways of doing this:
- In the left tree, click Users or Roles (under the appropriate customer account). If you are not using customer accounts, click Users or Roles under the System account.

  A list of current user or role members appears on the right-hand side of the page.
- Select the appropriate users or roles in the left table, then select the Projects tab in the right table. This displays the projects to which the selected user or role is currently assigned.

  Or:
- In the left tree, click Projects under the appropriate customer account. If you are not using customer accounts, click Projects under the System account.

  A list of current projects appears on the right-hand side of the page.
- Select the appropriate project in the left table, then select the Users or Roles tab in the right table. This displays the users or roles to which the selected project is currently assigned.

Figure 1-35



- Click Edit (located under the Global Filter column) next to the appropriate user or role. This opens the Global Filter Editor dialog box.

- Type the filter specification and click OK.

User Administration checks that the filter syntax is correct and then adds the filter to the frame on the right of the page.

Note: User Administration cannot check that the question exists in the project or that the value you have entered is valid for the question. If the question does not exist, the user/role will have access to all data. If the question exists but the value is not valid, which data the user/role sees (if any) will depend on the meaning of the expression as a whole. If the filter is `Region={SouthWest}`, for instance, and there is no such category, no data will be available because there is nothing that matches the filter. On the other hand, if the filter is `Region<>{SouthWest}`, all data will be available because all records will have a value other than SouthWest.

If you have a lot of global filters to set up, you may find it easier to import them from a spreadsheet rather than specifying them manually one by one. Refer to “Importing Users and Roles” in the User Administration help for details.

Changing a global filter

- Follow the steps for creating filters. When you click Edit, the dialog box shows the previous filter value. Enter the new filter and click OK to have the new filter replace the existing one in the main frame.

Deleting a global filter

- Follow the steps for creating filters. When you click Edit, the dialog box shows the previous filter value. Remove the filter value and clickOK.

User Properties Report

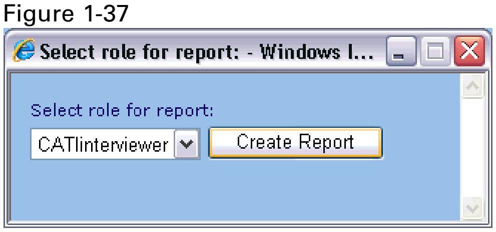
The User Properties Report displays user properties (as columns) grouped into IBM® SPSS® Data Collection Interviewer Qualifications and other properties (such as Location), for each interviewer (as rows). The User Properties Report is simply a listing of all user properties for the specified filtering role (and the role's users).

To run the User Properties Report:

- In the left tree, select the appropriate customer account. If you are not using customer accounts, select the System account.
- Select User Properties from the Reports menu.

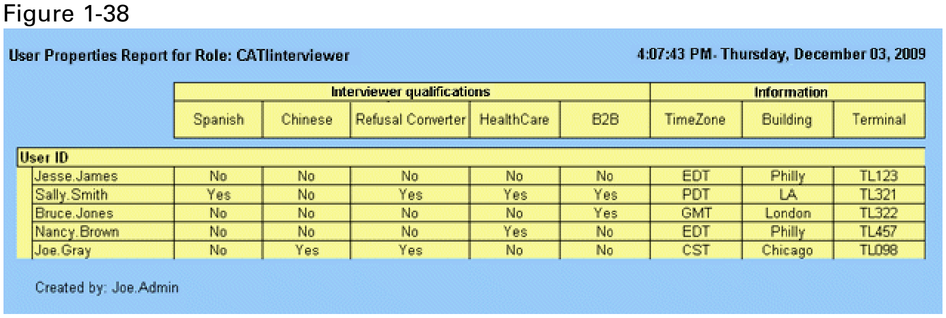
Figure 1-36


This opens the Select Role for Report dialog box.

Figure 1-37


- Select the appropriate role for the report and click Create Report.

The User Properties Report is generated based on the selected role.

Figure 1-38


User Properties Report for Role: CATIinterviewer 4:07:43 PM- Thursday, December 03, 2009

	Interviewer qualifications					Information		
	Spanish	Chinese	Refusal Converter	HealthCare	B2B	TimeZone	Building	Terminal
User ID								
Jesse.James	No	No	No	No	No	EDT	Philly	TL123
Sally.Smith	Yes	No	Yes	Yes	Yes	PDT	LA	TL321
Bruce.Jones	No	No	No	No	Yes	GMT	London	TL322
Nancy.Brown	No	No	No	Yes	No	EDT	Philly	TL457
Joe.Gray	No	Yes	Yes	No	No	CST	Chicago	TL098

Created by: Joe.Admin

User Roles Report

The User Roles Report displays roles (as columns), for each user (as rows). The user members of the role shown in the report are limited to those whom the Supervisor or IBM® SPSS® Data Collection Interviewer Server Administration User has access.

To run the User Roles Report:

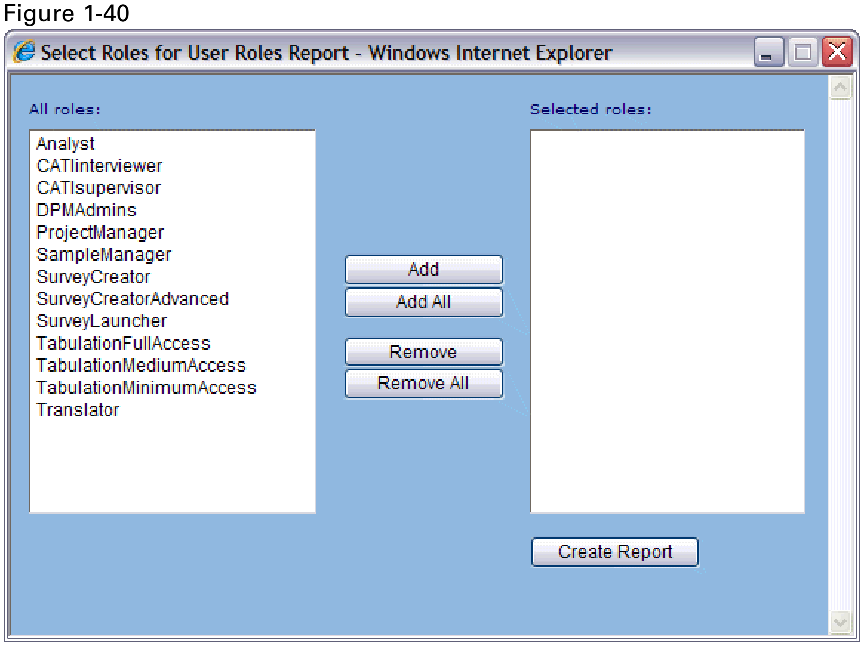
- ▶ In the left tree, select the appropriate customer account. If you are not using customer accounts, select the System account.

- ▶ Select User Roles from the Reports menu.

Figure 1-39

This opens the Select Roles for User Roles Report dialog box.

Figure 1-40



- ▶ Select one or more roles for the report and click Create Report.

The User Roles Report is generated based on the selected roles.

Figure 1-41

User Roles Report **4:47:00 PM- Thursday, December 03, 2009**

	Roles		
User ID	**CATIinterviewer**	**CATIsupervisor**	**DPMAdmins**
ddahl	No	No	No
DPMAdmin	No	No	Yes
SPSS\DDTestUser	No	No	Yes
SPSS\mrpdtest	No	No	Yes
user1	Yes	Yes	No
user2	Yes	Yes	No

1-6 of 6

Created by: DPMAdmin

Configuring account lockout settings

IBM® SPSS® Data Collection will lockout a user's account after three failed login attempts. The lock automatically clears after two hours (during this period if user attempts to login with the correct credentials, the login will fail). After two hours, users can again login to their accounts provided the appropriate credentials are entered.

Configuring the number of failed login attempts

▶ On the IBM® SPSS® Data Collection Interviewer Server, change the following registry entry:
HKLM > Software > SPSS > MRUserManagement > Database > Users > MaxFailedLogInAttempts >

The default key value is 3.

Configuring the user account lockout duration

▶ On the Interviewer Server, change the following registry entry:
HKLM > Software > SPSS > MRUserManagement > Database > Users > LockOutTimeSpan >

The default key value is 2 (hours).

Manually unlocking a user account

You do not have to wait for the specified lockout duration.

▶ Enter the User Administration activity.

▶ Select a locked user from the left pane.

▶ Click Modify in the right pane.

▶ Deselect the User Account is Locked Out setting, then click OK.

Files

Files is a simple tool for managing files belonging to a project.

IBM® SPSS® Data Collection Interviewer Server Administration stores the files for each project in two or three locations, depending on the project type:

- **Shared folder.** Files in this folder are visible to anyone who has permission to access the project. The location of this folder is *FMRoot\Shared\Projects\project_name*, where *project_name* is the name of the project.
- **User folder.** A separate user folder exists for each user who accesses the project. Files in this folder are private files that are visible only to the named user. The location of this folder is *FMRoot\Users\user_name\Projects\project_name*, where *user_name* is the Interviewer Server Administration user name.
- **Master folder.** This folder is used for IBM® SPSS® Data Collection Interviewer Server projects only. Whenever you activate a project, the activation process copies all files from the shared folder into the master folder. When a project is activated in Active mode, the activation process also sends a message to all Interviewing servers in the cluster telling them to update their copy of the project's files by copying files from this folder. Files in this folder are visible to anyone who has permission to access the project. The location of this folder is *FMRoot\Master\Projects\project_name*.

The way that files are managed varies, depending on whether you are using Interviewer Server or IBM® SPSS® Data Collection Survey Tabulation:

- File Management: IBM SPSS Data Collection Interviewer Server
- File Management: IBM SPSS Data Collection Survey Tabulation

When you have finished using Files, click the Home icon in the menu bar.

File Management: IBM SPSS Data Collection Interviewer Server

The default file management behavior for IBM® SPSS® Data Collection Interviewer Server is as follows:

- When an activity starts, it checks the user's folder for the files it needs. If the files exist these are the ones that the activity uses.
- If the files do not exist in the user's folder, the activity checks for them in the shared folder. Any files that exist here but not in the user's folder are copied into the user's folder.
- If a required file does not exist in either location, the activity either creates it or issues an error message. (Normally you should not see error messages for missing files because the activity should not be available if the required files do not exist.)

If the activity uses optional files such as templates, it follows these same rules to copy any optional files that exist. For example, the Launch activity requires a *.mdd* file and a *.sif* file, but can also use template files (*.htm*, *.html*, and *.xml*), image files (*.jpg*, *.jpeg*, *.png*, and *.mov*) and quota files (*.mqd*, *.mdd*), and copies any of these files that do not exist in the user's folder from the shared folder.

When an activity closes it leaves all files in the user's folder. If you want to make any changes or new files available to other users, you must check those files in to the shared folder.

Note: When you are working on a project, the project is locked so that other users can read files but not change them. When you have finished working on a project, you should not only check in the new or revised files but also unlock the project.

File Management: IBM SPSS Data Collection Survey Tabulation

IBM® SPSS® Data Collection Survey Tabulation handles the IBM® SPSS® Data Collection Interviewer Server Administration file management differently from the IBM® SPSS® Data Collection Interviewer Server activities, because Survey Tabulation always opens the data files in read-only mode. (When you create new variables in Survey Tabulation, they are stored separately from the main project data.)

The default File Management behavior for Survey Tabulation data files is as follows:

- When Survey Tabulation starts, it checks the user's folder for the files it needs. If the files exist, these are the ones that Survey Tabulation uses.
- If the files do not exist in the user's folder, Survey Tabulation checks for them in the shared folder. If the files exist, these are the ones that Survey Tabulation uses. Unlike the Interviewer Server activities, Survey Tabulation does **not** copy the files into the user's folder.
- If the files exist in neither location, you will get an error.

For information about how Survey Tabulation manages Tables Document (*.mtd*) files, see the Survey Tabulation documentation.

Starting Files

▶ Choose the project whose files you want to work with and click Files.

Viewing File Details

The frame in the center of the Files page lists the names of all files that you can access associated with the current project.

- Private files exist only in your user folder and are not visible to any other users.
- Files that are Checked In exist only in the shared folder and are visible to all users who have suitable access permissions. These files are tagged with an icon depicting two faces.
- Files that are Checked Out exist in both your private folder and the shared folder. Because a version of the file exists in the shared folder these files are also tagged with an icon depicting two faces.

When you hover over a filename in the list, details about that file are displayed in the yellow box on the right of the page. In this way, you can check which is the latest version of a Checked Out file, and when changes were last made.

You can sort the file list based on the values in any of the columns in the list. Just click on a column heading to sort the list according to the values in that column. The first time you click a heading, the values are sorted in ascending order — for example, from A to Z. If you click the same column heading again, the sort order is reversed.

You can select or deselect files in the file list by clicking their check boxes. To select or deselect all files in one go, click the check box in the title bar of the file list box.

If the project's folder contains subfolders, these are displayed at the top of the central frame. Click on a subfolder entry to step down into that folder and view its contents. Files updates the pathname in the frame's title bar and displays an "Up One Level" entry for returning to the parent folder.

Figure 1-42
Central frame of Files activity page showing subfolders and Up One Level link

Checking Files In to the Shared Folder

When you check a file in to the shared folder, it is moved from your user folder into the shared folder and becomes available to anyone who has access to the project. The file's status becomes Checked In. All files that exist in the shared folder have an icon with two faces next to them. This indicates that a version of the file is available to other users.

When you have changed a file or created a new one and you want that file to be available to other users, you must check it in to the shared area. This is particularly important if you are working on a project with other people. A number of activities default to using files from the user's working folder if they exist, so it is important that you check in any files that you have in your user folder, so that other users can then check them out from the shared folder into their own user folders before starting work.

For recommendations about when to check in files see When to Check Files In and Out.

To Check Files In to the Shared Folder:

- In the list of project files, select the Private or Checked Out files you want to check in.
- From the Files menu, choose:
  Actions > Check In
- If the file is an *.mdd* file and there is already an *.mdd* file in the shared folder, the Files activity merges new or changed information into the existing file to form a new version of the questionnaire.

Checking Files Out from the Shared Folder

When you check a file out from the shared folder, it is copied from the shared folder into your user folder. Any changes made to this copy of the file remain private to your user folder until you check the file back in to the shared folder. The file's status in the file list changes to Checked Out.

When you work in IBM® SPSS® Data Collection Interviewer Server, you should check files out the first time you work on a project that was created by someone else. It is also important to check out files when you are working on a project with other people. A number of activities default to using files that exist in your user folder. If you created the original files, and then checked them in for someone else to work on, and you then want to work on those files again, you must check out the latest versions of the files from the shared area otherwise you may find yourself working on out of date files.

To Check Files Out from the Shared Folder:

- In the list of project files select the Checked In files you want to copy.
- From the Files menu, choose:
  Actions > Check Out

Undoing Check-outs

If you have checked a file out from the shared folder there will be a copy of the file in the shared folder and a copy of the file in your user folder. The content of the two files may be different. If you want to remove the copy of the file from your user folder without updating the version in the shared folder you can undo the check-out.

To Undo Check-outs:

- In the list of project files, select the Checked Out files.
- From the Files menu, choose:
  Actions > Undo Check Out

When to Check Files In and Out

Some users find the concept of checking files in and out confusing, and often worry that they will lose their work either because someone else overwrites a file with a different version, or because they start working on the wrong version of a file without realizing it. The rules for checking files in and out can vary between and within companies, depending on the number of people involved in a project's development, so it is hard to give fixed rules about when to check files in and out. This topic gives some recommendations on good practise regarding checking files in and out, and provides an example that may help to clarify the situation further.

If you are worried about losing work, remember that all the time you have a project locked, very few of the project files will be available to any user who does not have administrative privileges. However, do not fall into the trap of keeping a project locked indefinitely as this can be annoying and counterproductive too.

Overview

When you work on a project, you always work on files in your personal User folder. Activities such as Build, that create questionnaires, always look for files in your User folder first, and will open those files if they exist. If an activity cannot find the files it needs in your User folder, it looks for those files in the Shared folder. If the activity finds the files it wants in the Shared folder, it copies them into your User folder and opens them. If the files cannot be found in your User folder or in the Shared folder, the activity creates a new file in your User folder and opens that file.

Certain options within activities create files in the Shared folder as well as in your User folder. For example, if you activate a questionnaire from within Build, the project's *.mdd* is checked in to the Shared area as part of the activation process. However, as long as you have the project locked, no one else can access the files in the Shared folder, so you can continue working on the project, knowing that nobody else has access to the files.

You can check files in to and out of the Shared folder whenever you wish, simply by running Files. If you are the only person working on a project, it is not important when you check files in because you will always have the files you need in your User folder. This is not the case when you are working on a project with other people. In that situation, it is important that you check files in and out regularly and at the appropriate points in the project's development cycle, as this ensures that each user has access to the latest versions of the project's files.

Recommendations

The following recommendations should ensure that everyone working on a project has access to the latest versions of the project files.

- When you start work on an existing project, always run Files and look to see whether there are any project files in the Shared folder. If so, check these files out. This places copies of those files in your User folder.
- When you start work on a new project, check your files in regularly. For example, if you are designing a new questionnaire using Build, you might want to check your files in when you have finished the first draft of the questionnaire.
- If you have finished working on the project for the time being and have checked all your files in, unlock the project so that other users know that they can use the files.

- It is possible to unlock a project without checking in files, but this is bad practise as this is how newer files can be overwritten with out of date ones. If you unlock a project that already has files in the Shared folder, and you are interrupted before you have time to check in your latest files, someone else may check out the old files from the Shared folder. If you then check in your files, they will be overwritten when the other person checks in their changes, and your changes will be lost. Get into the habit of checking in files and then unlocking the project. If in doubt, do not unlock the project.
- As soon as you run an activity on a project, the project is locked and other users will not be able to access the files. If you are ready to work on a project but cannot run an activity straight away, lock the project to prevent other users using the files.

Example

Here is an example that illustrates how an questionnaire designer, a translator, and a scriptwriter can all work on a project together.

- The questionnaire designer creates the project and runs Build to build the basic questionnaire. It takes the designer two days to complete the first draft of the questionnaire. The project is automatically locked by questionnaire designer, so the translator and scriptwriter cannot access any of the files that Build creates. (In any case, until the questionnaire designer checks the files in manually or tests or activates the questionnaire, the files exist only in the User folder.)
- The questionnaire designer tests the questionnaire, which automatically copies files from the User folder into the Shared folder. However, because the project is still locked, no one else can access these files.
- The questionnaire designer continues the cycle of testing and modifying the questionnaire. Because no one else has yet worked on the project, and because Build always uses the files in the User folder if they exist, there is no need for the questionnaire designer to check in the files during this process.
- At the end of the second day, the questionnaire designer has finished all she can do on the questionnaire and is ready to pass it to the scriptwriter for the final changes to be made prior to translation. She therefore uses Files to check all the files in her User folder into the Shared folder, and then unlocks the project. At this stage, the files in the Shared folder become available to the scriptwriter and the translator.
- On the third day, the scriptwriter checks the project files out from the Shared folder into her User folder. Because she will not be able to work on the files straight away she locks the project to ensure that no one else can check out the Shared files and start working on them.
- Later that day, the scriptwriter makes some additions to the questionnaire and runs some final tests. She does not check the files in after every change because she has the project locked and knows that no one else can access the Shared files. When the scriptwriter is satisfied that the questionnaire is finished, she checks all the project files that are in her User folder into the Shared folder and unlocks the project. This makes the files in the Shared folder available to other users.
- The translator checks out the *.mdd* file and locks the project, even though she cannot use IBM® SPSS® Translation Utility through IBM® SPSS® Data Collection Interviewer Server Administration. She then downloads the file onto her computer and translates the texts. When she has finished, she uses Files to upload the translated file into her User folder and then checks it in to the Shared folder. Finally, she unlocks the project.

- The scriptwriter checks all the project files out into her User folder and runs some final tests to ensure that the script appears correctly in the various translations. She works on the project as soon as she has checked out the files, so she lets Interviewer Server Administration lock the project for her automatically.
- The scriptwriter activates the project in Active mode, and the project becomes available for live interviewing. If the scriptwriter made any changes to the questionnaire, she checks the files back in before unlocking the project.

Some users (usually managers) have permission to unlock other people's projects. If you have this permission, be very careful when you use it and what you do with the project files after you have unlocked the project. For information about unlocking other people's files, and an example that illustrates the possible pitfalls of careless unlocking, see Unlocking Other Peoples' Projects.

Uploading Files from your Computer into your User Folder

You can upload files from your computer into your user folder on the IBM® SPSS® Data Collection Interviewer Server Administration server. This allows you to use files such as templates or image files that have been created outside of Interviewer Server Administration. You can upload up to ten files at a time. Manage Files can upload files whose full pathnames are no longer than 128 characters. If you have files whose pathnames are longer than this you will need to rename them before uploading.

The Files activity uploads files in two stages. First it makes a copy of each file in a temporary folder. Each file is given a unique temporary name so that there is no chance that two people uploading files with the same name will overwrite each other's files. Then, it copies each file in turn into the project's folder in your user folder, renaming the file as it does so, and deletes the temporary file from the Temp folder. (The name of the temporary folder is defined in the registry in the DimensionNetUploadFolder key and defaults to c:\InetPub\wwwroot\SPSSMR\Temp.)

Files makes the following checks as it copies files into your user folder:

Filenames. All files belonging to a project must have a name whose root matches the project ID; that is, they must be called ProjectID.*xxx*. Activities locate the files they need to use by taking the project's ID and looking for files whose root matches that name. When creating files, activities name them by using the project ID with an appropriate extension. The exceptions are template files, which are often shared between many projects, and sample files.

When you upload a file that has an extension that Interviewer Server Administration recognizes as a project file extension, and its name does not match the ID of the current project, Files asks you whether you want it to rename the file. You should normally answer Yes to this question.

Existing files. If a file already exists in your user folder, Files asks whether to overwrite it with the uploaded file. If you answer No, the file is not uploaded.

.mdd files. The procedure for existing files applies, but Files does not upload the file if its format is invalid or if it was created with a later version of IBM® SPSS® Data Collection that you are using now. (Technically, the test is whether the file's version number is greater than the version number of the MDMLib component that is installed on your computer.)

Empty files. Files issues a warning and ignores the file.

Zipped files. Files unzips the contents of the zipped file so that the component files are available separately in your user folder (the exception is if the zipped file contains another zipped file; in this case the second zipped file is not unzipped). All checks for non-zipped files are carried out on the individual files in a zipped file so, for example, if the zipped file contains an *.mdd* file that already exists in your user folder you will be asked whether to overwrite the existing file or merge the uploaded file into the existing file.

If the zipped file contains a folder structure, Files creates new subfolders within the project folder to match this structure. This ensures that the relationships between the files in the zipped file are maintained when the files are uploaded.

You can create subfolders within the project folder and upload files into subfolders. You might want to do this if you want to keep template files and stylesheets separate from the other project files, or if you have language-specific files that you want to store separately.

Notes:

- The Files activity does not support pathnames or filenames containing Japanese characters. If you want to upload a file whose name contains Japanese characters you should rename it first.
- If you are using Internet Explorer with a pop-up blocker installed and you are uploading files from different machines using the IP addresses of those machines, you must turn off the pop-up blocker if you want to upload zipped files.

To Upload Files into your User Folder:

▶ If necessary, navigate to the subfolder into which you want to upload files.

▶ From the Files menu, choose:

Actions > Upload

This opens the Upload Files dialog box. The Files to Upload list is empty when you start but will later display the names of the files you have chosen to upload.

▶ Click Browse.

This opens a standard Windows Choose file dialog box.

▶ Select the file you want to upload and click Open.

The filename is added to the Files to Upload list. If you choose a file whose name already exists in the Files to Upload list (even if the file is from a different location) an error message is displayed and your selection is ignored.

- Repeat these steps to select more files. The Browse button is disabled once you have chosen ten files.
- If you need to remove a file from the upload list, click the red cancel icon next to the filename. If you decide not to upload any files at all click Cancel.
- When you have finished choosing files, click Upload.

A progress dialog box shows the status of the upload process and the name of the file currently being uploaded.

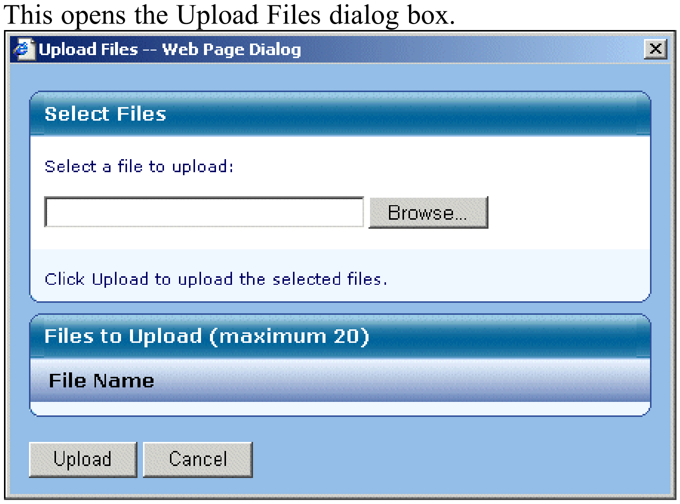
You can cancel the upload at any time by clicking Cancel. This stops copying files and deletes any that have already been copied into the Temp folder.

When all files have been uploaded, you are returned to the main screen where you will see the uploaded files tagged as Private in the file list.

To Create a Subfolder to Upload into:

- From the Files menu, choose:
  Actions > Upload

This opens the Upload Files dialog box.



- Click Browse.

This opens a standard Windows Choose file dialog box.

- Click the Create New Folder icon and then replace the default folder name with a name of your choice.
- Click Open to create the subfolder.
- Click Cancel to close the Choose file dialog box.

▶ Click Cancel to close the Upload Files dialog box.

Uploading Files Created with IBM SPSS Data Collection Interviewer Server Desktop Applications

The Files activity allows you to upload any project files of your choice into the IBM® SPSS® Data Collection Interviewer Server Administration project folder. If the files have different filenames to the Interviewer Server Administration project, you can choose to rename the files as you upload them.

In most cases, renaming files has no effect on the way those files can be used in Interviewer Server Administration, because the files do not normally contain their names or the names of other files. The exception is files to do with quotas: these are typically the *.mqd* file that contains the project's quota definitions and the **_sm.mdd* file that is created when a project's quotas are based on variables in the sample records. If you are uploading files for a project that uses Quota Control, you must be very careful about renaming files.

The *.mqd* file contains the name of the questionnaire definition (*.mdd*) file that it relates to. It also contains the name of the **_sm.mdd* file if there is one. When you upload these files, the Files activity can rename them but it cannot change the filenames that are stored in the *.mqd* file, and this name mismatch will cause activation in Interviewer Server Administration to fail.

The easiest (and recommended) way to avoid this problem is not to mix Interviewer Server Administration and desktop activities during the script creation and activation stages of a project. If you create a questionnaire script using a text editor, you should activate it using the scriptwriter's desktop program or the command-line *activate* program. If you create a questionnaire script using the Build activity in Interviewer Server Administration, you should activate it in Interviewer Server Administration too. Do not create questionnaires using desktop programs and then activate in Interviewer Server Administration, or vice versa. This will ensure that all files are created with the appropriate names, and that those names appear correctly in files that need to store project filenames.

When a Interviewer Server Administration project uses Quota Control, the recommended procedure for creating the *.mqd* file and making it available to Interviewer Server Administration is as follows:

▶ Create the questionnaire script using Build or IBM® SPSS® Data Collection Base Professional.

▶ Download the *.mdd* file onto your local machine.

▶ Run IBM® SPSS® Data Collection Quota Setup to create the *.mqd* and, if appropriate, the **_sm.mdd* files using the downloaded *.mdd* file.

▶ Upload the *.mqd* and **_sm.mdd* files into the Interviewer Server Administration project folder. Since the filenames already match the project name no renaming will be necessary.

Downloading Files onto your Computer

If you want to make changes to a template or other file that is not normally available to IBM® SPSS® Data Collection Interviewer Server Administration, you can download the file from your user folder or from the shared folder onto your computer, make whatever changes are necessary

and then upload the file into your user folder. You can then check the file in to the shared folder from your user folder.

If you choose a subfolder to download, Files creates a zipped file whose name is based on the activity name and the current date and time. You can save the file with this name or rename it before saving. If the subfolder contains other folders, the folder structure will be preserved when the zipped file is created.

To Download Files onto your Computer:

- ▶ In the list of filenames, select the file you want to download.
- ▶ From the Files menu, choose:
  Actions > Download

  This opens the standard Windows File Download dialog box.
- ▶ Click Open to open the file or Save to save the file in a location of your choice.

Deleting Private Files

You can delete files that exist in your user folder and that are marked as Private. You cannot delete files that are marked as Checked In or Checked Out.

To Delete Private Files:

- ▶ In the list of filenames, select the file you want to delete.
- ▶ From the Files menu, choose:
  Actions > Delete
- ▶ Confirm your request when prompted to do so.

Activation Settings

Activation Settings provides options for defining how projects that are activated to the IBM® SPSS® Data Collection Interviewer Server are handled. You can view Activation Settings in IBM® SPSS® Data Collection Interviewer Server Administration via:
Options > Activation Settings

Note: The Activation Settings option only displays for users who belong to the **DPMAdmins** role.

Activation Settings fields

Number of Threads. The number of processing threads used for project activation. The default value is 1.

Delay between Activations. The amount of time, in milliseconds, to wait between activations. The default value is 10 milliseconds.

Default Date Range. The date range to display in the Activation History activity's Activation Report. The default value is 30 days.

Default Message Range. The message date range to display in the Activation History activity's Activation Report. The default value is 30 days.

Activation Report Refresh Interval The amount of time before the Activation History activity's Activation Report automatically refreshes. The default value is 180 seconds.

Refer to "Activation History" topic in the *Interviewer Server User's Guide* for more information.

Manage Logs

IBM® SPSS® Data Collection Interviewer Server Administration and the activities and applications that run inside it create a number of log files that provide an audit trail of what each activity has done. If you experience problems with IBM® SPSS® Data Collection Interviewer Server, the IBM® SPSS® Data Collection administrator or a IBM Corp. support representative will need to look at these files to find out what is causing the problems. In a small installation where everything is installed on a single machine, all the log files will be stored in a single folder and can be viewed easily using any text editor. On clustered installations, log files are created on each machine in the cluster, which makes viewing them and matching up records between files quite difficult.

Manage Logs provides an easy method of viewing log files, and can be used to create a zip file containing logs of your choice for sending to an IBM Corp. support representative if you have problems that need investigation.

Note: Although the primary purpose of log files is to record events, some log entries may contain actual data or respondent details or references that enable data or respondent details to be extracted from other files. In addition, log files are not project specific and many log entries contain the project name, making it easy to locate information for a particular project.

Since these things are likely to be security issues in companies that provide Data Collection services to a number of external clients or where different teams work on different clients' projects, this first release of Manage Logs is available only to Data Collection administrators. It is planned that future releases will automatically filter log entries so that users see only the entries that refer either to the system as a whole or to their own projects. Administrators will, of course, still have access to all records.

Starting Manage Logs

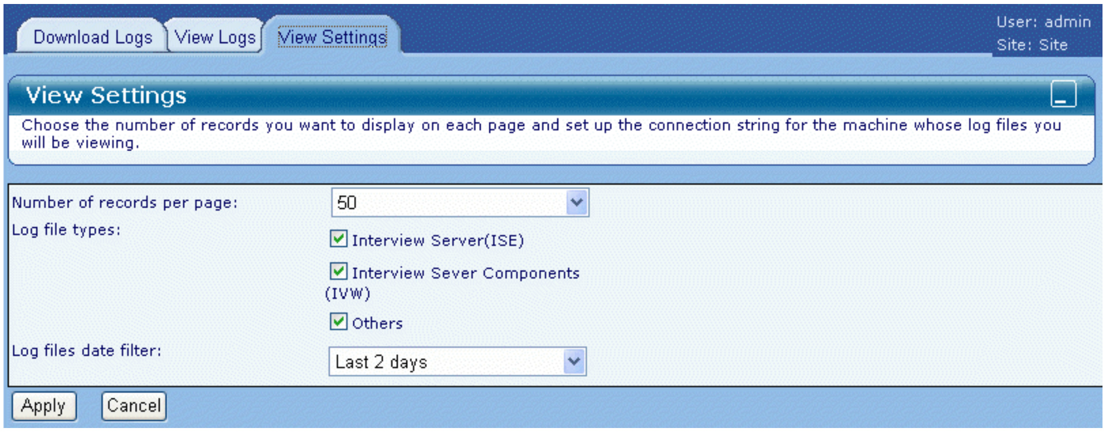
▶ From the IBM® SPSS® Data Collection Interviewer Server Administration menu, choose Tools > Manage Logs

View Settings

The View Settings tab is where you specify the types of records you want to view and the number of records to display per page. You can also specify a date range. This applies to the log files themselves, not to the records they contain. The start date is the date on which the file was created

and the end date is the date that the file was last modified. Some log files grow more quickly than others, so in order to see records for a problem that arose on 26 October you may need to request log files for the period 20 to 27 October to see everything that happened.

Figure 1-43
View Settings tab



To Specify the View Settings

- Select the View Settings tab.

- In Number of records per page, choose whether to display 50, 100, 500, or 800 records per page.

- In Log file types, choose the log files whose records you want to see.

Select	For
IBM® SPSS® Data Collection Interviewer Server (ISE)	Records related to the interview engine.
Interviewer Server Components (IVW)	Records related to interviews.
Others	Records from log files for other activities such as Participants or Export Data.

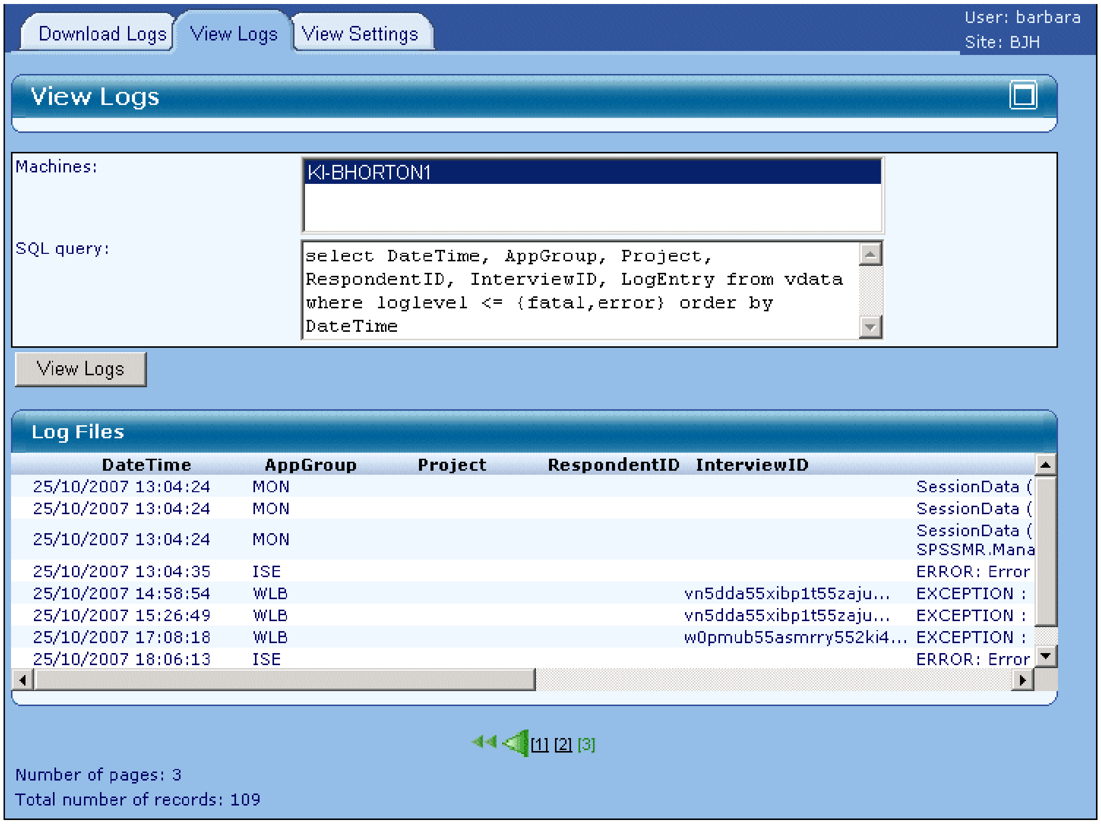
- In Log files date filter, choose the date range for the files you want to use. Possibilities are the last two, 12, or 24 hours, the last two days, or the last week. The default is the last two days. If you would rather specify your own date range, select Custom and then choose the start and end dates in the new fields that Manage Logs displays.

- Click Apply to save your changes.

Viewing Log Files

User the View Logs tab to look at individual records in log files.

Figure 1-44
View Logs tab



Initially, records are filtered according to the settings on the View Settings tab so that, for example, you may see only records from certain files and for certain dates. Within these restrictions, you can request records from a selected machine only and can filter the records using an SQL query. This allows you, for example, to select only records that are flagged as belonging to a particular project, or that relate to events between noon and 5pm on a certain day. The default is to display all records logged at the Info, Warning, Error, or Fatal logging levels and to sort them in ascending date and time order. If you want more information about logging levels, refer to "Logging Level" in the Log DSC section of the IBM® SPSS® Data Collection Developer Library documentation.

To View Log Records

- Select the View Logs tab.
- In Machines, choose the machine whose log records you want to see.
- In SQL query, type the query you want to use for selecting and displaying records.
- Click View Logs.
- If there is more than one page of records, use the buttons and links below the list frame to see those pages. If there are no records that match your selection criteria, the words "No records" are displayed.

▶ To see the full text of an error message without scrolling, click the message text and it will be displayed in a pop-up dialog box.

Downloading Log Files

If there are problems with your installation that you cannot solve, you may be asked to send the log files to your SPSS support representative. The easiest way to do this is to use the Download tab to create a zip (compressed) file that you can then send by email.

The download process copies all files that were created on or after a given start date or that were last modified on or before a given end date. When choosing dates, remember that some files grow more quickly than others so you may need to extend the date range outside the period when the problem actually existed. The download process also creates a ReadMe file containing information related to the problem. You provide some of this information and some comes from DPM.

Zipped files are named *SiteName*_yyyy–mm–dd.zip (for example, BJH_2007–10–26.zip). Once the file has been created, Manage Logs displays a standard Windows download message box asking whether you want to open or save the file.

The date range, the file types downloaded, and the setting for Windows event files are saved in DPM as application settings so that they become the defaults the next time you run Manage Logs.

Notes

- Although downloading is usually quite fast, it may take some time if you download a lot of very large log files or you download Windows event logs. You will not be able to use IBM® SPSS® Data Collection Interviewer Server Administration while the download is in progress.
- If you have a number of people with administrator privileges, only one of those users can download log files at a time.

To Zip and Download Log Files

▶ Select the Download Logs tab.

▶ In Machines, choose the machines whose log records you want to download.

▶ In Log file types, choose the types of log files you want to download:

Select	For
IBM® SPSS® Data Collection Interviewer Server (ISE)	Records related to the interview engine.
Interviewer Server Components (IVW)	Records related to interviews.
Others	Records from log files for other activities such as Participants or Export Data. Select the appropriate log files from the list (Shift+Left Click or Ctrl+Left Click).

▶ In Log files date filter, choose the date range you want to see. Possibilities are the last two, 12, or 24 hours, the last two days, the last week, or the latest (the last modified log file for each selected log file type). The default is the last two days. If you would rather specify your own date range, select Custom and then choose the start and end dates in the new fields that Manage Logs displays.

Note: The date range applies to the creation and last modified dates of the log files themselves, not to the dates that the log entries were written. On a lightly loaded system this may mean that some files contain information that is not relevant to the current issue.

▶ Select Include windows event logs? if you want to download the Windows system and application logs. The default is to download these files as they often contain useful information about what has been happening on a machine while Interviewer Server Administration has been running.

▶ Select Use regular expression to filter? if you want to define a regular text expression upon which to search. When selected, you can enter a text expression in the provided field. Only log files that contain the defined text will be returned.

▶ Use the check boxes in the ReadMe content section to specify information to be added to the ReadMe file that is created to accompany the log files.

- In Priority, select the job's importance to you.
- In Contact details, type the name and telephone number or email address of the person that the support representative should contact about the problem.
- In Description of problem, type a clear and concise description of the problem that has been observed. If you have other information that will be helpful, make a note of it here. For example, if a sample management script has recently been changed or the problem occurred after a system upgrade, add it to this field so that the support representative is aware of the issue.

▶ Click Download Logs.

What's in the Zip File

The zip file that Manage Logs creates contains the following files in the order shown:

Filename	Description
dpm_out.txt	A text file listing the contents of DPM.
ReadMe.html	Additional information about the files.
ApplicationEvents.csv SystemEvents.csv	The Windows application and system event logs, if requested.
*.tmp	IBM® SPSS® Data Collection log files. The exact files depend what was requested.

The ReadMe File

The *ReadMe.html* file contains the following information:

- When the zip file was created and by which version of the log tool.
- Which versions of IBM® SPSS® Data Collection Interviewer Server Administration and its associated applications are installed.
- The names of the machines whose log files have been included, the function of each machine in the cluster (interviewing server, for instance), each machine's time zone, and how many log files have been collected from each machine.
- Information that you entered on the Download tab.

If you need to amend the problem description, you may do so by editing the file and saving it back into the zip file. There is no need to rerun the download simply for this.

Appendix

A

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